CONCUR

Overview of
Concur Project Methodology

Trainer: Rebecca Cheung

Date: 4 October, 2018

Agenda

- Introducing Concur’s implementation methodology
- Defining project roles & responsibilities
- Defining partner roles & responsibilities
- Overview of Concur’s implementation stages
- Explaining the rules of engagement
- Defining project documentation and tools
- Preparing and planning for a successful project
- Outlining rollout methodology
- Discussing the differences between Premium & Professional implementations

Introduction to Concur's Implementation Methodology

Setting the Scene for Success - Expectations

Preparation

Project Sponsorship: Establish Project Board and Steering Committee members

Project Plan: Agree on the initial project plan and define the milestone dates

Requirements: Gather requirements early and involve local business experts

Standardise: Critically review legacy processes and consolidate requirements

Change Management: Consider early planning of change management activities

Approach

Governance: To enforces the vision and goals of the implementation

Control: Plan activities to ensure the milestones are achieved

Simplify: To drive user adoption and streamline system maintenance

Best Practice: Adopt the recommended best practice approach where possible

Emphasis: Is on effective communication and change management

Best Practice Expense Solution

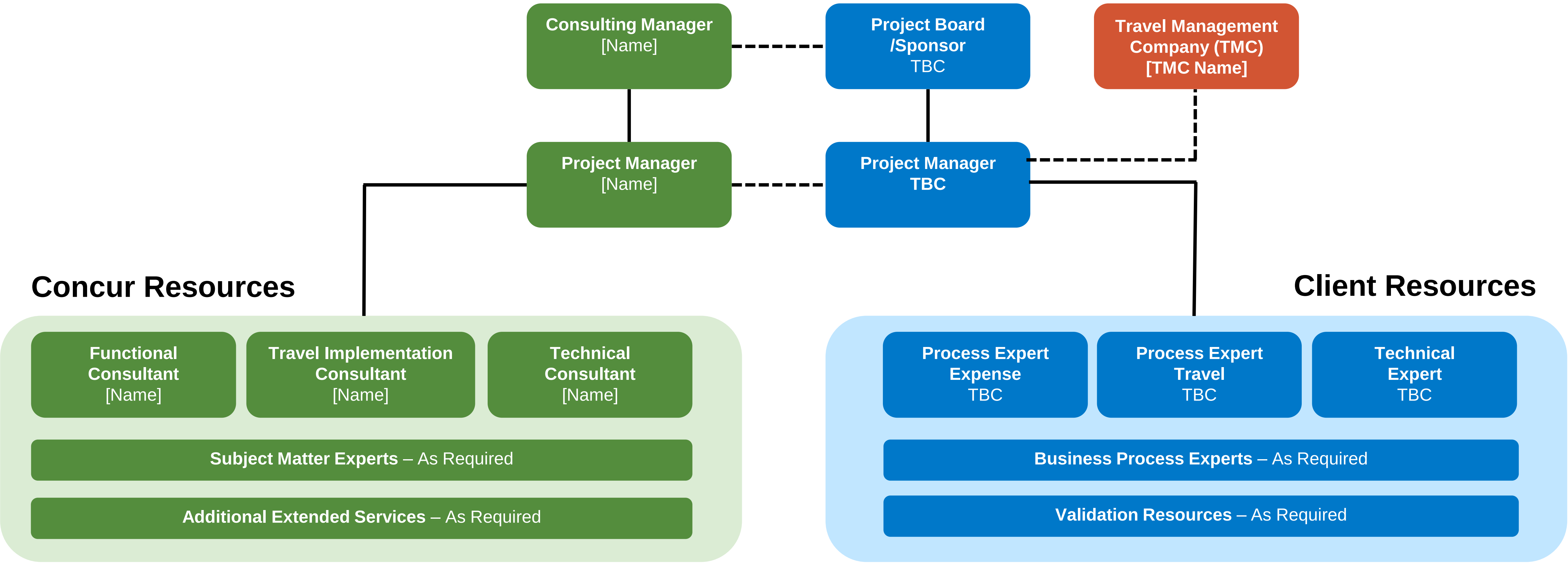
Benefits
- Reliable
- Repeatable
- Flexible

Availability
- Primary European markets
- Includes North America and APAC
- Supported country guides

Foundation
- Concur expertise
- Common interpretations
- Customer experiences

Project Roles and Responsibilities

Project Team Structure – Concur/Client



Roles and Responsibilities

Concur

Consulting Manager:

- Is the point of contact for the Executive Sponsor
- Attends sponsor calls (where applicable) and supports the governance and vision for the project
- Is the escalation point for project-related issues

IPM/PM:

- Leads the overall project
- Handles peer-to-peer communication with Client PM
- Supplies initial Project Plan template
- Schedules and manages Concur resources

Client

Executive Sponsor:

- Provides executive leadership and governance
- Owns the strategic process to ensure business objectives are met: control vs ease of use and cost vs control
- Sponsor vision and organizational change

Client / Customer Success Partner

Project Manager:

- Develops and implements internal project and deployment plan
- Leads the project team
- Reviews and analyzes business requirements
- Reviews and approves joint project plan
- Oversees test results
- Develops and implements deployment plans

Roles and Responsibilities

Concur

Design Specialist/Functional Consultant:

- Provides expertise on design
- Reviews and analyzes business requirements
- Delivers design documentation
- Provides input on file import content
- Provides configuration and process guidance
- Supports testing cycle and resolves issues

Travel Consultant:

- Provides expertise on design
- Reviews and analyzes business requirements
- Provides configuration and process guidance
- Liaises with Client TMC
- Supports testing cycle and resolves issues

Client / Customer Success Partner

Back Office or Accounting Team:

- Provides expertise on back office processing and payment
- Supports testing activities
- Assists with credit card management (if applicable)

Process Experts:

- Provide business process requirements and expertise
- Provide local expertise on Travel & Expense policies
- Support testing activities

Travel Management Company

Online Technical Manager:

- Provides connectivity to GDS
- Provides Profile, PNR, and Reporting requirements
- Handles vendor rate loading activities
- Supports testing cycle and resolves issues

Roles and Responsibilities

Concur

Technical Consultant:

- Provides technical expertise on integrations, feeds, loads, and extracts
- Assists with load and extract issues
- Assists with setup of FTP / PGP and SSO

Integration Services Consultant:

- Provides technical expertise on Web Services, Connectors, and Custom Extracts
- Liaises with Concur PM and TC

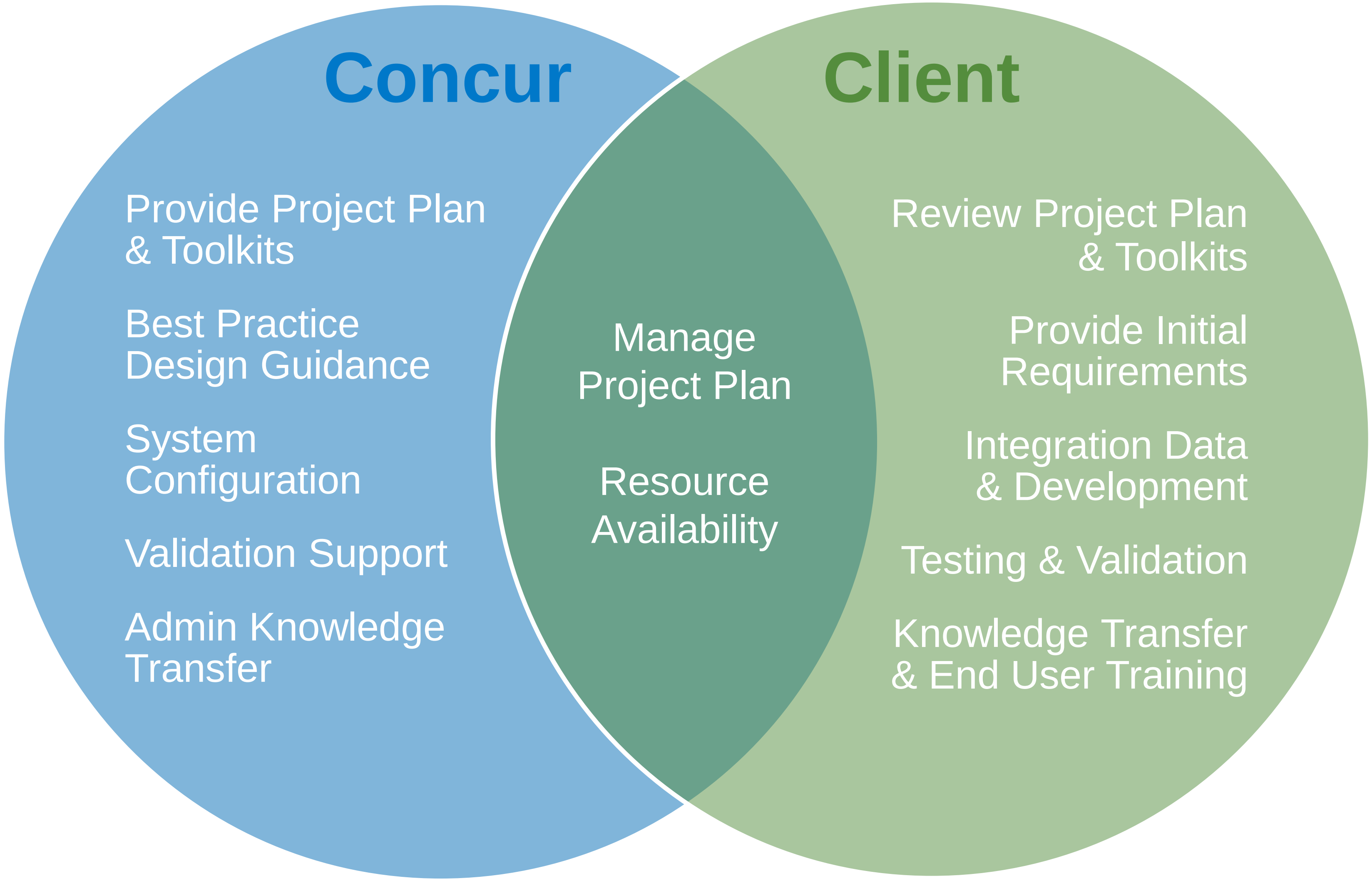
Client / Customer Success Partner

IT/Technical:

- Provides integrations, feeds, loads, and extracts
- Handles load and extract issues
- Sets up FTP / PGP and SSO

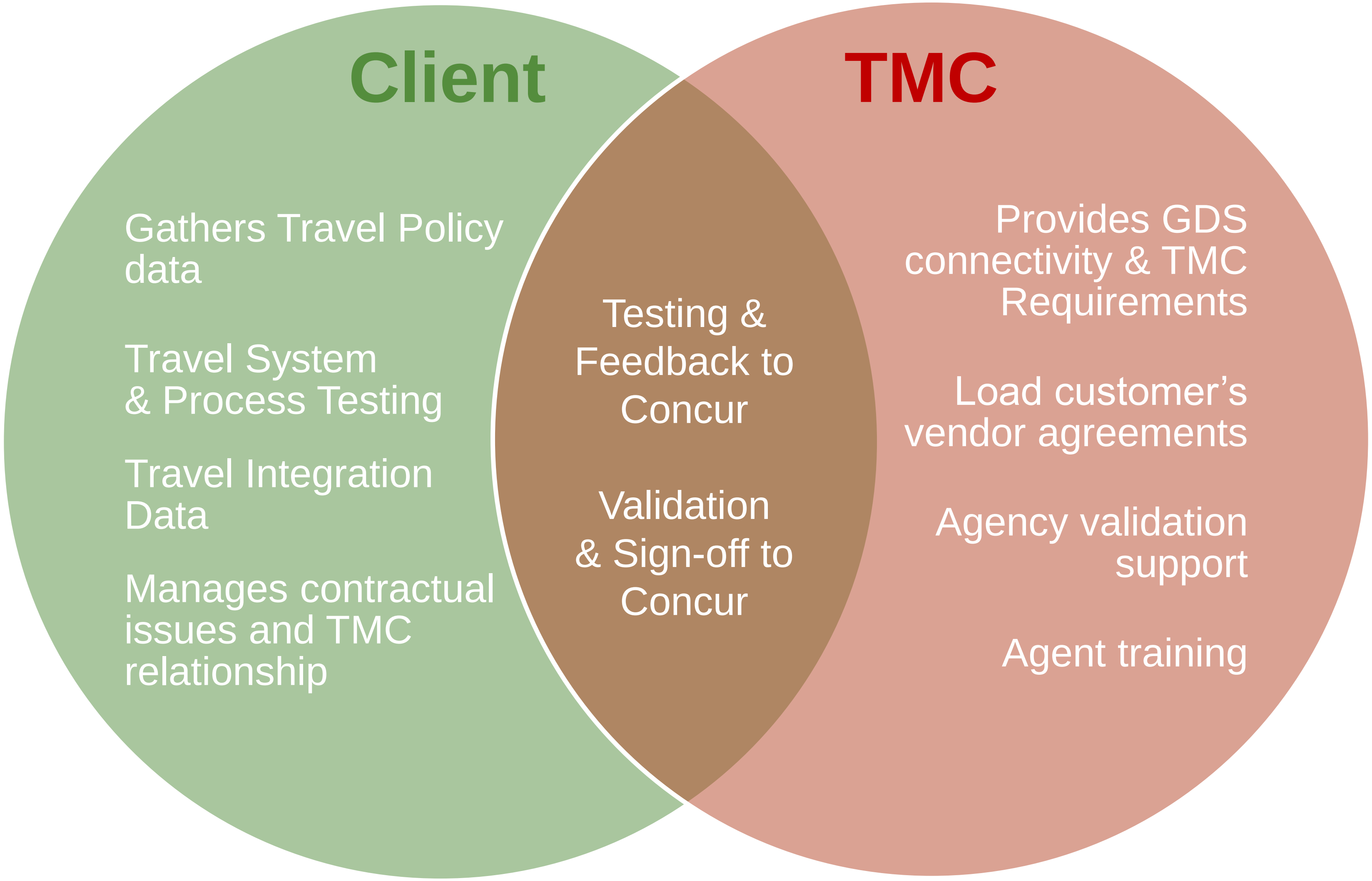
Roles and Responsibilities

Summary



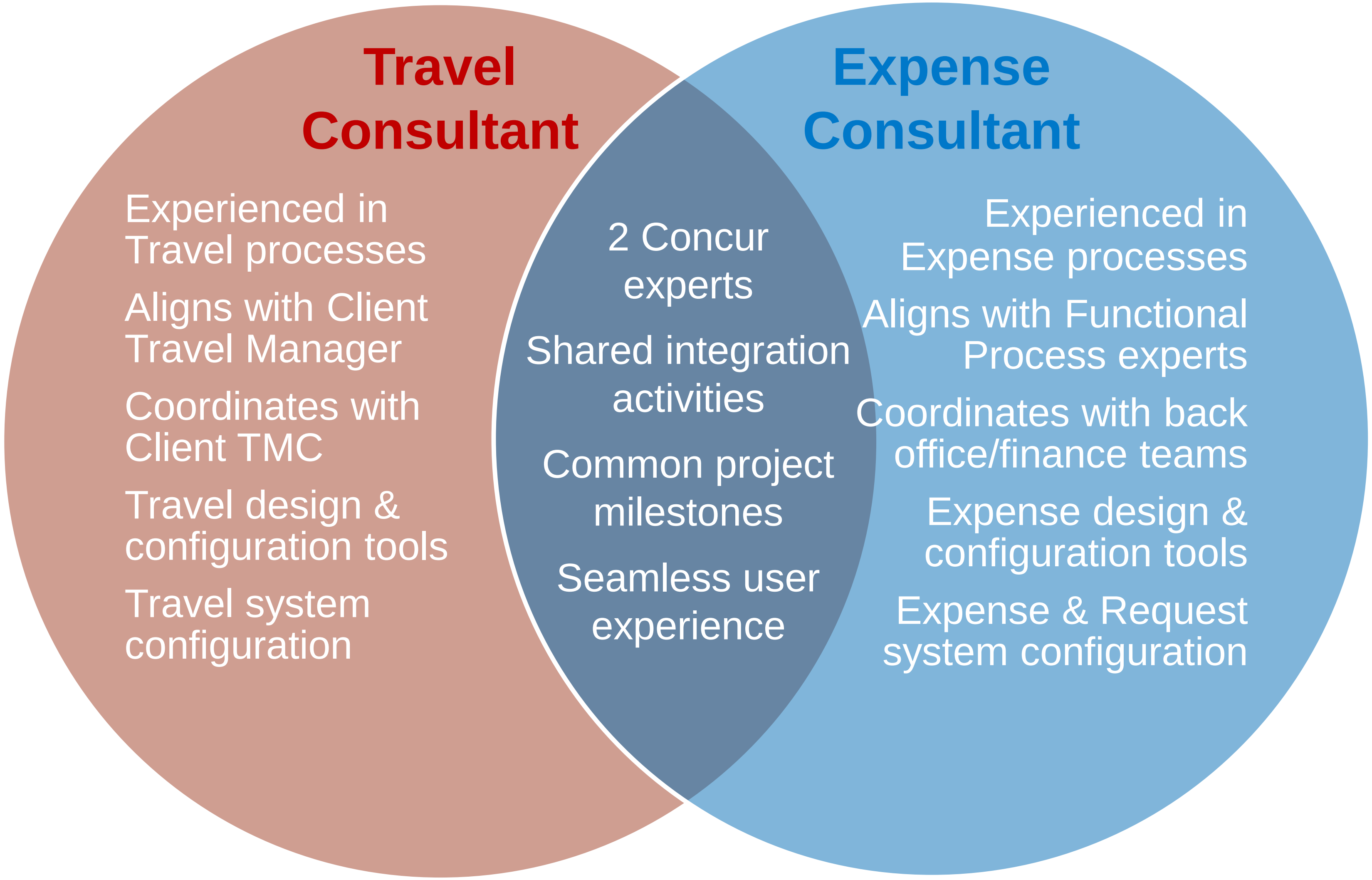
Roles and Responsibilities

Summary



Roles and Responsibilities

Summary



Partner Roles and Responsibilities

Client-side Partner Activities

Primary Roles and Responsibilities

Project Management (Client Implementation Manager)

- Develop and implement joint deployment plan
- Assist with business requirements review and analysis
- Oversee testing process
- Identify and engage sponsors and stakeholders
- Celebrate successes and create positive momentum

Change Management and Training

- Define change management strategy and develop a plan
- Implement a communications plan
- Training – provide system overview to local country team
- Transfer back office knowledge to customer
- Reinforce change

Primary Roles and Responsibilities

Requirements gathering and T&E expertise

- Support the initial completion of design documentation
- Focus on critical business requirements and legislative/statutory requirements
- Global Template comparison - review the country guides and best practices with project team
- Challenge and control – simplify requirements; remove all unnecessary complexities
- Document potential gaps

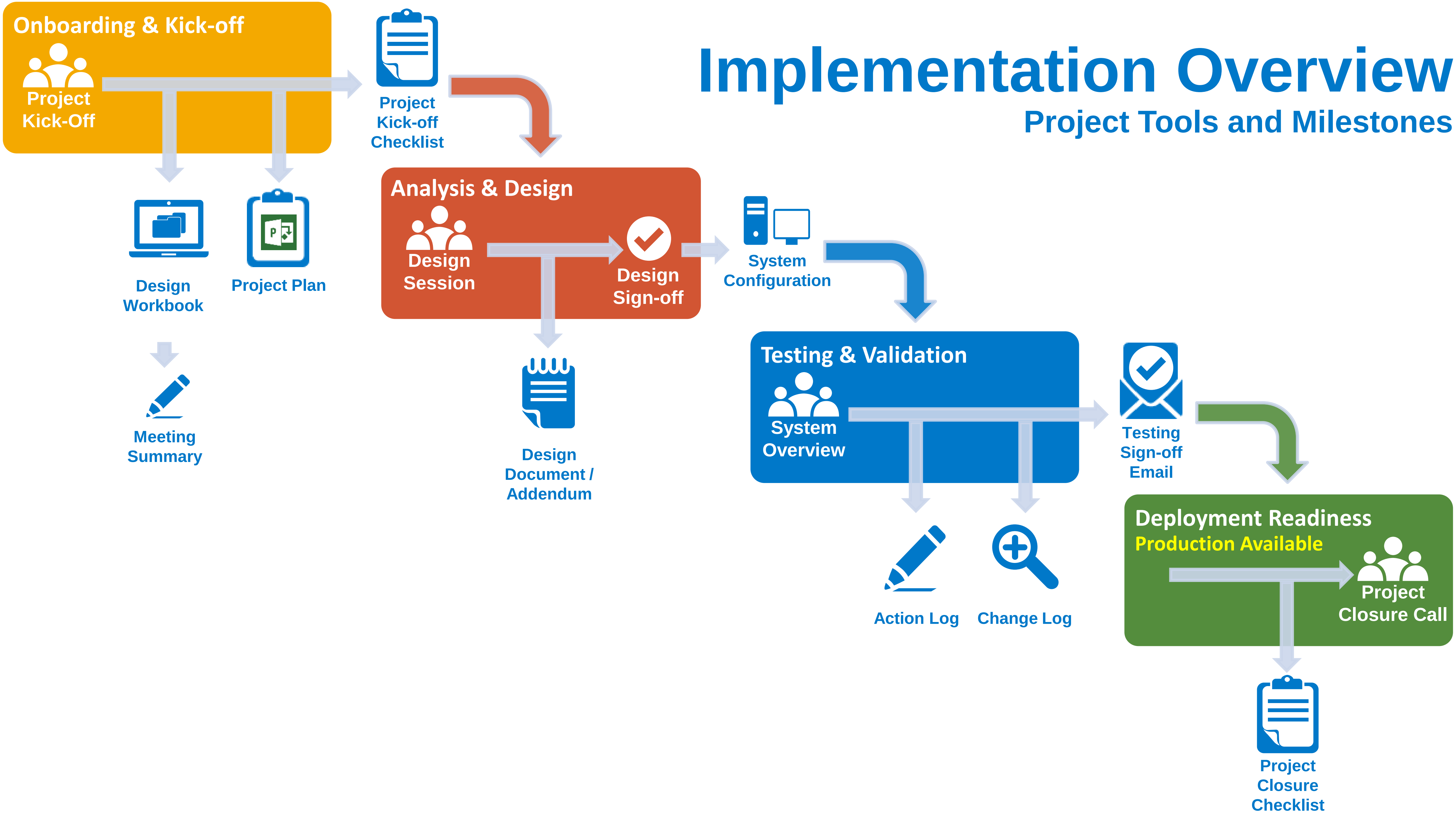
Testing Support

- Build and prepare test scripts (focus on the deltas)
- Assist local testing
- Consolidate actions or queries following testing (filter internal and usability issues)
- Test minor configuration changes
- Assist local markets with localization for supported languages (where applicable)

Implementation Stages

Implementation Overview

Project Tools and Milestones



Overview of Key Milestones

Onboarding & Kick-off

Concur

- Conduct Introduction and Kick Off call
- Provide overview of and access to documentation and supporting toolsets

Client

- Review training, deployment and technical toolkits
- Gather requirements
- Complete and return initial workbooks

Analysis & Design

Concur

- Run design session
- Prepare and submit design documents for iterative review
- System configuration

Client

- Review financial system integration requirements (Technical – FTP, PGP & templates)
- Perform final review and Concur/Client sign off of implementation design documents

Testing & Validation

Concur

- Release
- Make configuration tweaks identified during UAT
- Deliver back office and system admin knowledge transfer

Client

- Perform UAT
- Re-test configuration changes
- Evaluate test results
- Conduct integration testing
- Sign off on testing

Deployment Readiness

Concur

- Prepare system for production
- Transition client to Concur Support, Managed Services, & Account Management

Client

- Execute deployment plan
- Deliver user training
- Prepare for go-live
- Attend Client Support webinar

Rules of Engagement

Rules of Engagement

Project principles

Meetings

- Weekly status calls
- Summary created by Concur
- Client is responsible for reviewing the meeting summary
- Ensure the Actions log is updated 48h prior to the call to enable Concur review

Communication

- Client PM is the single point of contact for the Concur PM
- PM is responsible for coordinating all activities for countries in scope
- Allow up to 2 business days for Concur to respond to requests

Resourcing

- Concur teams are not dedicated to a single project
- Ensure technical resources are assigned and available early
- Resources are required for the entire duration of the project

Timelines

- Timely arrival to meetings or calls
- Don't underestimate the time required for the project
- All Concur travel costs are billed to the customer

Absences

- Communicated at the beginning of the project
- Factored into the project plan by Concur PM
- No additional Concur cover during this period (unless agreed)

Continuance

- Project is at risk if there are periods of inactivity or non-communication
- Project escalated to Consulting Manager for re-engagement
- Project may be placed on hold
- Project team may be unassigned

Rules of Engagement

Deployment Definitions and Terminology

The date that Concur provides the Service to the client for production use

Initial deployment includes all countries agreed upon as part of the deployment scope

Billing commences, as per the contract, or upon production availability

Production Availability

The following terms do not represent production availability in Concur:

- Go-live
- Full roll-out
- Pilot
- Proof of concept

Client internal constraints that do not delay production availability:

- Client interface development
- End-user training or change management
- Parallel external projects

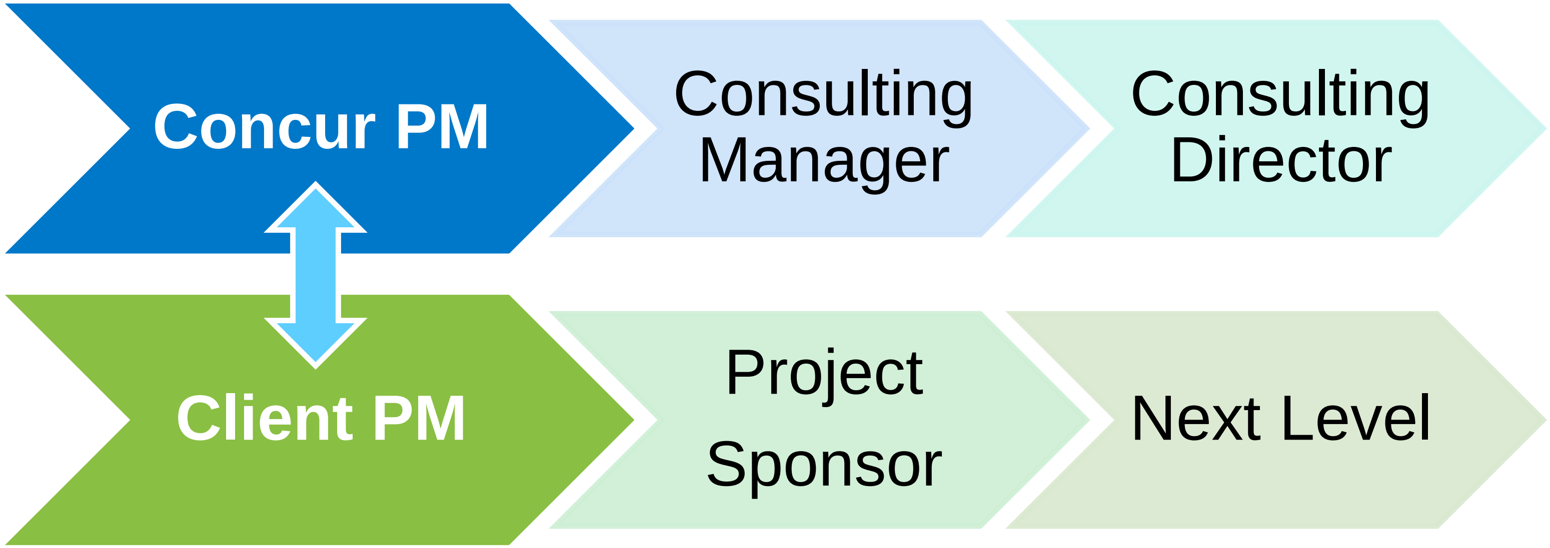
Rules of Engagement

Primary/First Line Escalation Process

All escalations will be managed by the primary project contact:

- Concur Project Manager or Program Manager
- Client Project Manager

The primary project contact will be responsible for managing the escalation path:



Rules of Engagement

Governance

Governance Team

- Executive Sponsorship drives governance (local and global)
- Global Project Lead to drive change control
- Client Project Manager to drive change management

Governance Objectives

- Provide challenge and control
  - Identifies ‘Nice to Have’ v ‘Statutory or Business Case’
  - Work with Concur regarding configuration impact (minor v major)
    - Minor – new expense type
    - Major – new workflow
- Promote the Global Template
  - Enforce adherence to Global Template
  - Communicate reasoning behind global decision

Project Documentation & Tools

Project Toolsets

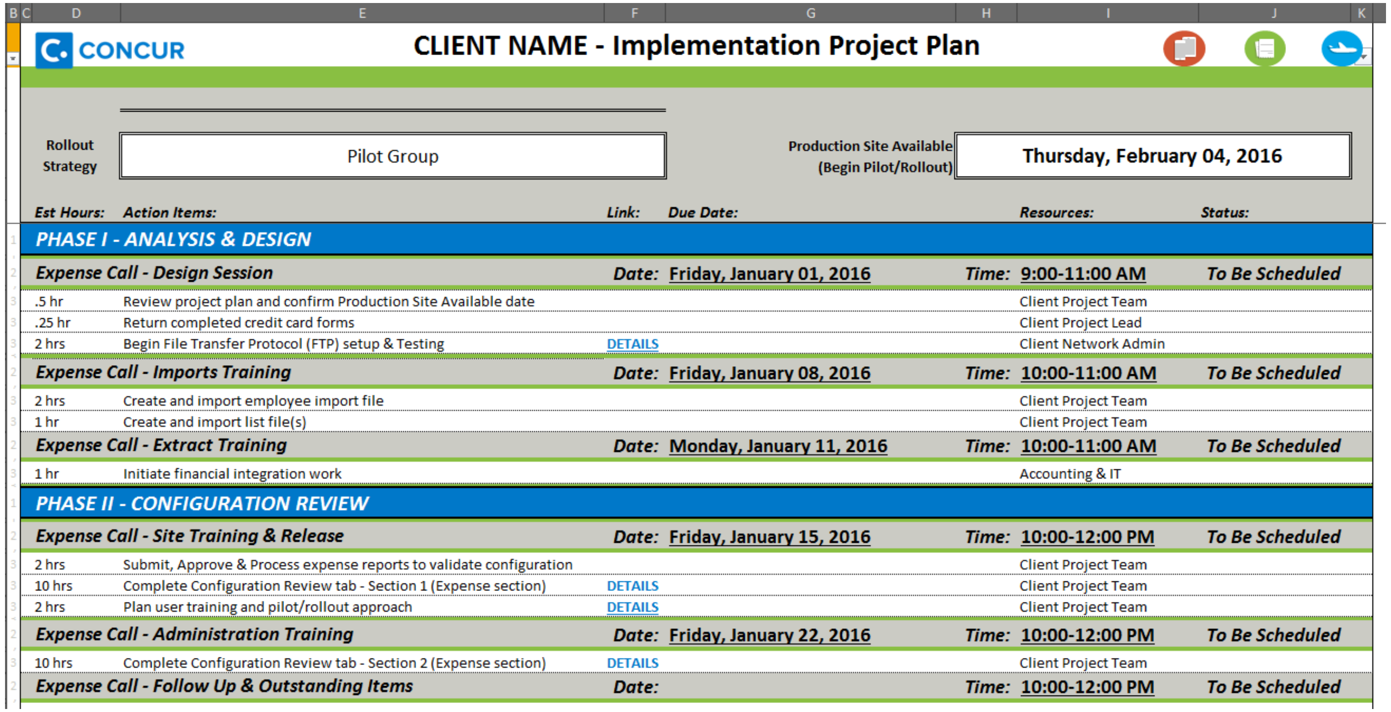
Project Plan - Project Milestones

Project plan format

- Available in Microsoft Excel
- Additional Microsoft Excel task list for Travel available

Includes:

- Detailed task activities
- Primary resource assignments
- Key activities and milestones
- Tracking and status flag indicators for completed milestones



CONCUR CLIENT NAME - Implementation Project Plan

Rollout Strategy: Pilot Group

Production Site Available (Begin Pilot/Rollout): Thursday, February 04, 2016

Est Hours:	Action Items:	Link:	Due Date:	Resources:	Status:
PHASE I - ANALYSIS & DESIGN					
Expense Call - Design Session			Date: Friday, January 01, 2016	Time: 9:00-11:00 AM	To Be Scheduled
.5 hr	Review project plan and confirm Production Site Available date			Client Project Team	
.25 hr	Return completed credit card forms			Client Project Lead	
2 hrs	Begin File Transfer Protocol (FTP) setup & Testing	DETAILS		Client Network Admin	
Expense Call - Imports Training			Date: Friday, January 08, 2016	Time: 10:00-11:00 AM	To Be Scheduled
2 hrs	Create and import employee import file			Client Project Team	
1 hr	Create and import list file(s)			Client Project Team	
Expense Call - Extract Training			Date: Monday, January 11, 2016	Time: 10:00-11:00 AM	To Be Scheduled
1 hr	Initiate financial integration work			Accounting & IT	
PHASE II - CONFIGURATION REVIEW					
Expense Call - Site Training & Release			Date: Friday, January 15, 2016	Time: 10:00-12:00 PM	To Be Scheduled
2 hrs	Submit, Approve & Process expense reports to validate configuration			Client Project Team	
10 hrs	Complete Configuration Review tab - Section 1 (Expense section)	DETAILS		Client Project Team	
2 hrs	Plan user training and pilot/rollout approach	DETAILS		Client Project Team	
Expense Call - Administration Training			Date: Friday, January 22, 2016	Time: 10:00-12:00 PM	To Be Scheduled
10 hrs	Complete Configuration Review tab - Section 2 (Expense section)	DETAILS		Client Project Team	
Expense Call - Follow Up & Outstanding Items			Date:	Time: 10:00-12:00 PM	To Be Scheduled

Project Toolsets

Project Plan – Client Action Items

Includes:

- Listing of client responsibilities for each phase of the project
- Resource(s) assigned
- Assignment Dates
- Due Dates
- Task Status

CLIENT ACTION ITEMS	Assigned To:	Assigned	Due	Status	Resource	Comment
Phase I - Analysis & Design						
Review recommended training modules in the Deployment Toolkit		1/1/2016	1/5/2016		Deployment Toolkit	
Provide company logo		1/1/2016	1/5/2016			
Review project plan and confirm production site available date *-Includes Concur Project Manager and Client Project Management Team.* *- Collaborative scheduling of all meeting dates/times* *- Concur will schedule resources according to the timeline once the Project Timeline is finalized* *- Concur will make the production site available on the committed launch date and production billing will begin the following month*		1/1/2016	1/1/2016			
Complete and submit credit card forms *-Timely submission is very important. If there are any issues that may delay this task, escalate the issue immediately.*		1/1/2016	1/5/2016			
Begin FTP/PGP set up & testing *-IPM will introduce Client Technical Team to Concur Technical ConsultantClient* *-Technical Team needs to review the technical materials on the Deployment Toolkit prior to Knowledge Transfer call with TC*		1/1/2016	1/15/2016		Technical Overview, Documents & Specs	
Complete & import initial custom lists (manual)		1/8/2016	1/15/2016			

Project Toolsets

Project Plan – Configuration Change Log

Includes:

- Listing of configuration change requests
- Assignment Dates
- Requestor
- Product
- Completion Dates

Configuration Change Log

Item #	Assigned Date	Requested By	Product	Change Requested (detailed description)	Party Responsible to Complete Change	Completed By	Change Reviewed By	Completed Date
1								

Project Toolsets

Project Plan – Configuration Review

Includes:

- Areas to review to verify configuration is completed correctly
- Reviewer
- Date Reviewed
- Additional Comments

B	C	D	E	F	G

Configuration Review

At the start of the Configuration Review, the first invoice may start as early as the next calendar month, which is usually within our timeline to complete the rest of the implementation. If a project includes additional features such as Travel Allowance, Travel Request or additional VAT setups, it can take more than our typical project timeline. Your service will be in a billable status and billing will begin at the transaction tier stated in your Services Agreement.

The following configuration elements should be reviewed by your team following each call in which the corresponding Configuration Elements were discussed. Immediately following our final call of Phase 2 I will begin the first step of our Phase 3 process which is Rollout and Transition to Client Support.

In Phase 3, you will no longer have access to your “test data” as we will be purging the site of all expense report data, SAE files, employee banking data and credit card numbers. Any custom reports saved in the public folder will also be removed.

Configuration Elements to Review	Answer	Reviewed By	Date Reviewed	Comments
Section 1 - Complete Immediately After Phase 2 - Service Training & Site Release Call				
EXPENSE				
Expense Types				
Do any additional Expense Types need to added?				
Do any Expense Types need to be removed?				
Do any Expense Types need to be renamed?				
Are all Expense Types in the correct category?				
Custom Fields				
Does the Report Header have all the fields it needs?				
Do any Expense Types have fields that need to be added or removed?				
If using Allocations, does the Allocation Form have all the fields it needs?				
Does the Attendee Form have all the fields it needs?				
Does the Expense section of the Employee Form have all the fields it needs?				
Expense Report Workflow				
Are submitted expense reports going to the proper approver?				
Is your receipt policy limit working as expected?				
Is the USGSA service functioning?				
Is VAT functioning?				

Project Toolsets

Project Plan – Project Contacts & Scope

Includes:

- List of contacts (name, email, phone, and role) of key project players

Scheduling Notes / Contacts / Services Included

***EXPENSE* Rollout/Pilot Strategy:**			
Rollout Strategy:	Pilot Group	**End User Communication Date:**	
Date for Initial Rollout:		**Training Style:**	
Number of Users for Initial Rollout:		**Training Ready Date:**	
Additional Rollout Notes:		**Initial User Training Date:**	

Vacation/Out of Office/Scheduling Notes:

Name	Email	Phone	Role/Title	ASC?
			Concur Expense Implementation Project Manager	N/A
			Concur Implementation Services Manager	N/A
			Concur Technical Consultant	N/A
			Concur Regional Sales Executive	N/A
			Concur Account Manager (Contact for when Implementation project is complete)	N/A

Services Included:	*Description/Overview:*
Concur® Analysis	Concur's reporting offering includes an "on-demand" hosted reporting and analysis service. This service is seamlessly integrated with Concur's powerful solutions, providing access to your organization's travel and expense data. You can use the Concur reporting tools to create detailed, actionable reports to control costs and more effectively manage employee spend. Analysis is part of the Concur service and training is offered by Concur's Learning Services team.

Project Toolsets

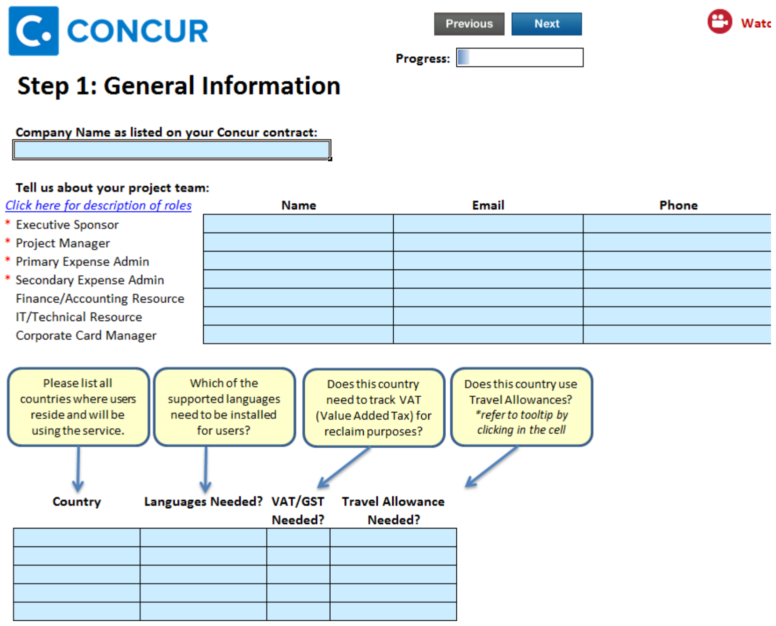
Customer Design Workbook

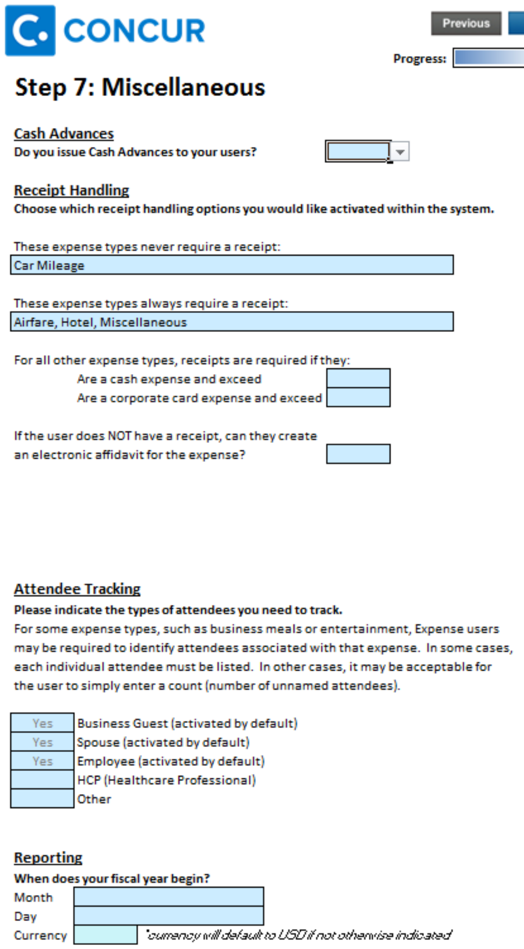
Purpose:

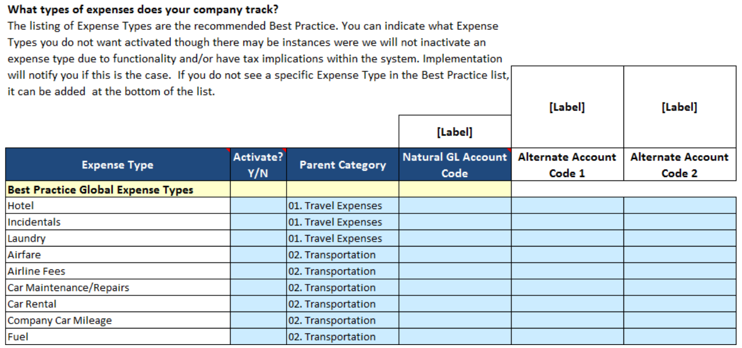
- To gather key information required for your implementation of Concur
- Synchronised with our pre-configured best practice solution
- Allows for simple gathering of requirements and activation or deactivation of features

Features:

- A wizard-based Excel format
- Clear and simple layout
- Interactive option-driven questions
- Embedded help videos
- Includes sections for Expense, Travel, and Request







Project Toolsets

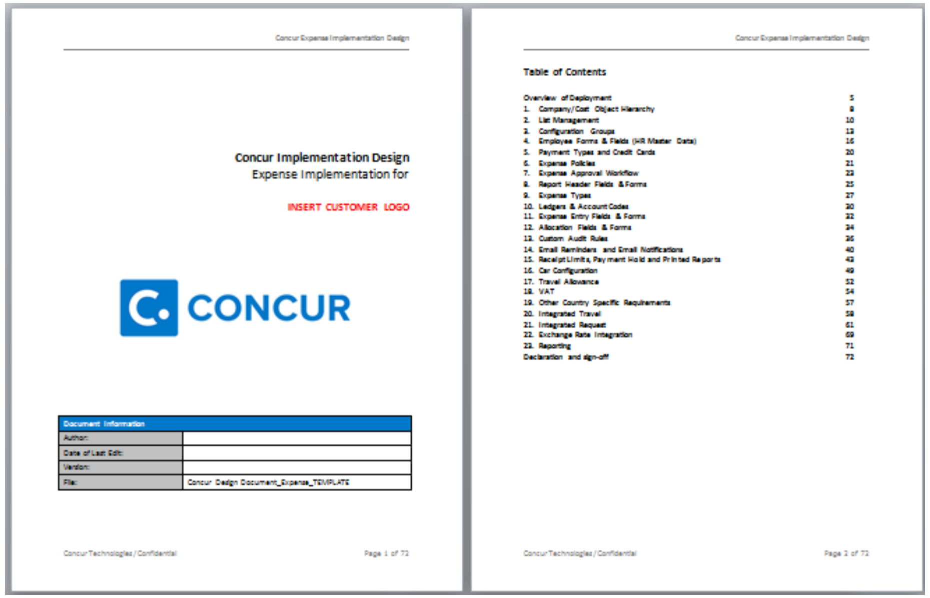
Design Document

Purpose:

- Central repository for Expense functional requirements (includes Request if in scope)
- Forms the agenda of the design session
- Blueprint of the client global design template
- Consolidates relevant design discussions
- Outlines design options and actions

Features:

- Iterative review process
- Aligned with best practice template
- Chronological order of configuration items
- Embedded configuration workbooks
- Also serves as an educational resource


Concur Expense Implementation Design

Concur Implementation Design
Expense Implementation for

INSERT CUSTOMER LOGO

CONCUR

Document Information	
Author:	
Date of Last Edit:	
Version:	
File:	Concur Design Document_Expense_TEMPLATE

Concur Technologies / Confidential   Page 1 of 72

Concur Expense Implementation Design

Table of Contents

Concur Technologies / Confidential   Page 2 of 72

Design Addendum:

- Simpler alternative to full design document
- Optional for smaller Professional projects
- Supplements the CDW to document one-off complex items which require analysis
- Outlines the business justification and impact of not implementing (including the estimated effort)

Project Toolsets

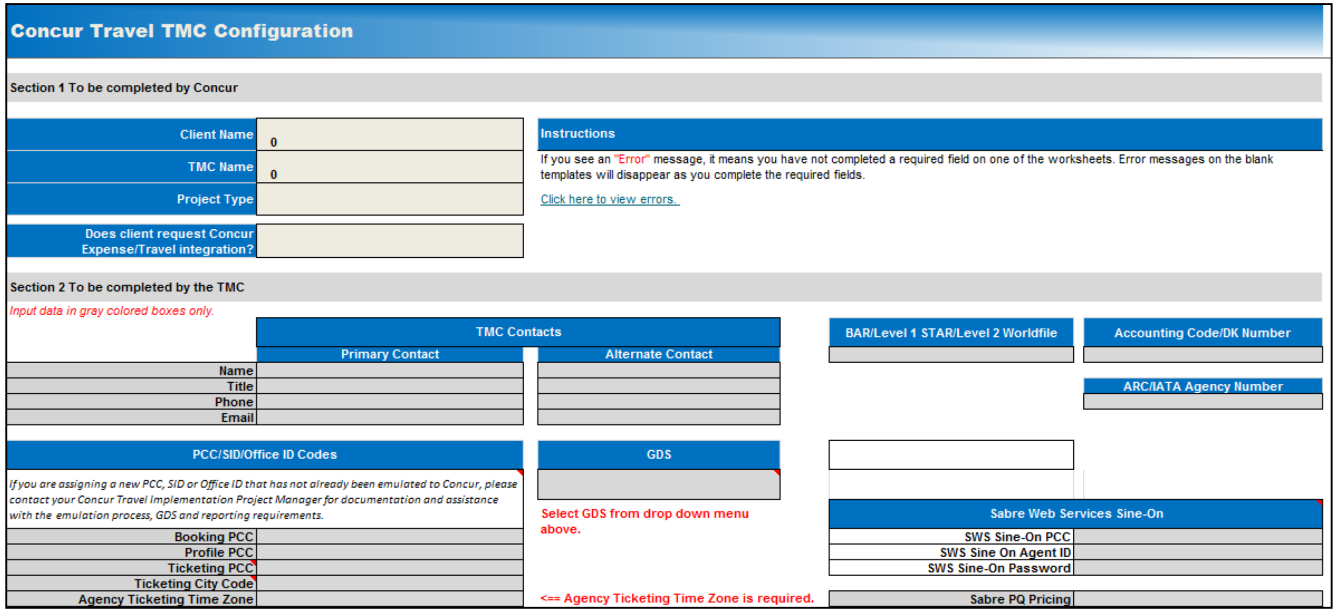
Travel Workbook

Purpose:

- Central repository for Concur, TMC and customer site configuration requirements
- Outlines options for simple activation or deactivation of features
- Policy guidelines

Features:

- Individual worksheets for customer and agency
- Simple instructions


Concur Travel TMC Configuration

Section 1 To be completed by Concur

Client Name	0	
TMC Name	0	
Project Type		
Does client request Concur Expense/Travel integration?		

Instructions

If you see an "Error" message, it means you have not completed a required field on one of the worksheets. Error messages on the blank templates will disappear as you complete the required fields.

Click here to view errors.

Section 2 To be completed by the TMC

Input data in gray colored boxes only.

TMC Contacts	Primary Contact	Alternate Contact
Name		
Title		
Phone		
Email		

BAR/Level 1 STAR/Level 2 Worldfile

Accounting Code/DK Number

ARC/IATA Agency Number

PCC/SID/Office ID Codes

If you are assigning a new PCC, SID or Office ID that has not already been emulated to Concur, please contact your Concur Travel Implementation Project Manager for documentation and assistance with the emulation process, GDS and reporting requirements.

Booking PCC	
Profile PCC	
Ticketing PCC	
Ticketing City Code	
Agency Ticketing Time Zone	

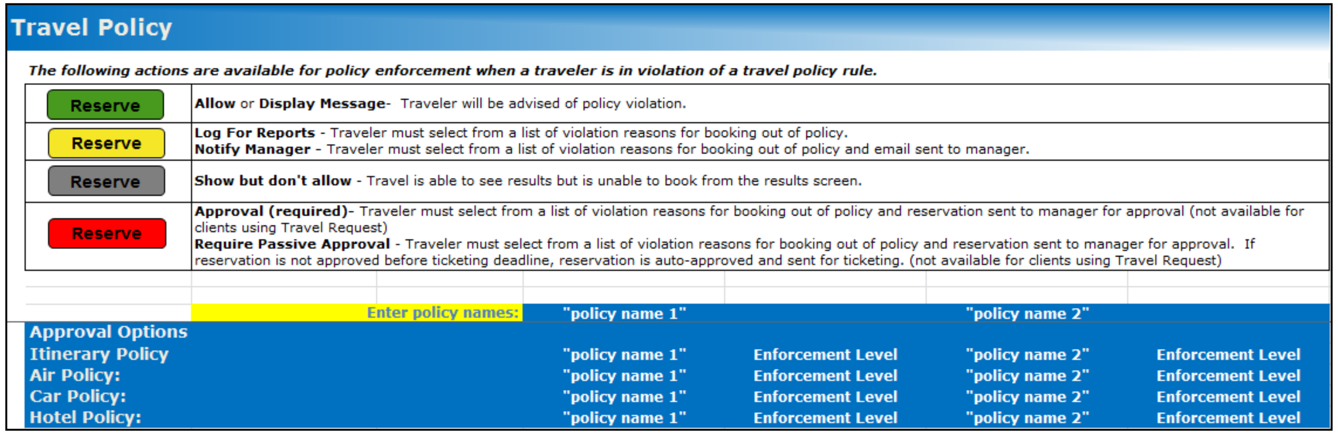
GDS

Select GDS from drop down menu above.

<== Agency Ticketing Time Zone is required.

Sabre Web Services Sine-On

SWS Sine-On PCC	
SWS Sine On Agent ID	
SWS Sine-On Password	
Sabre PQ Pricing	


Travel Policy

The following actions are available for policy enforcement when a traveler is in violation of a travel policy rule.

Reserve	**Allow** or **Display Message**- Traveler will be advised of policy violation.
Reserve	**Log For Reports** - Traveler must select from a list of violation reasons for booking out of policy. **Notify Manager** - Traveler must select from a list of violation reasons for booking out of policy and email sent to manager.
Reserve	**Show but don't allow** - Travel is able to see results but is unable to book from the results screen.
Reserve	**Approval (required)**- Traveler must select from a list of violation reasons for booking out of policy and reservation sent to manager for approval (not available for clients using Travel Request) **Require Passive Approval** - Traveler must select from a list of violation reasons for booking out of policy and reservation sent to manager for approval. If reservation is not approved before ticketing deadline, reservation is auto-approved and sent for ticketing. (not available for clients using Travel Request)

Enter policy names:	"policy name 1"		"policy name 2"	
Approval Options				
Itinerary Policy	"policy name 1"	Enforcement Level	"policy name 2"	Enforcement Level
Air Policy:	"policy name 1"	Enforcement Level	"policy name 2"	Enforcement Level
Car Policy:	"policy name 1"	Enforcement Level	"policy name 2"	Enforcement Level
Hotel Policy:	"policy name 1"	Enforcement Level	"policy name 2"	Enforcement Level

Preparing and Planning for Implementation

Initial Requirements Gathering

What information will clients and partners need to prepare?

- Primary countries in scope, which represent the main business centers of the organization and highest volumes of users and transactions
- Third party vendors – travel management company or travel agency (TMC) as well as your GDS and corporate credit card providers
- Overview of back office and ERP systems, especially the HR and financial systems with which you will be integrating
- Functional and business requirements that relate to the corporate expense policy, including expense types, approval workflows, policy rules, etc.
- Compliance or legislative requirements such as travel allowance (per diems), VAT, or mileage reimbursement

Change Management

A Change Management plan ensures that change takes place in a structured, organized, and controlled fashion. A solid and effective Change Management plan involves the following steps:

1. Define the Change Management strategy
2. Prepare the Change Management team
3. Identify and engage sponsors and stakeholders

Concur provides Change Management information and tools, such as:

- Leading Change and Change Management Presentation – ppt deck
- Training videos (to provide end-user training) – mp4 format
- Guidelines for Creating a Change Management Plan – Word doc
- To access, go to: http://www.concurtraining.com/prdeployment/expense/deployment_and_transition

Reporting Services

Concur offers customers a reporting tool powered by Cognos that provides access to an extensive catalogue of standard reports, together with the ability to create custom reports

Online Training Toolkit includes:

- Online training manuals
- Online training videos
- Recorded training sessions
- Open enrolment instructor led training
- Pre-built Standard reports catalogue

Check out Concur's Reporting Training site

http://www.concurtraining.com/pr/reporting/resources

Purchase Reporting Services such as:

- Managed Reporting
  - Dedicated Concur Reporting Expert
  - Client-specific custom reports
- Ad-hoc Consulting Hours
  - Additional custom reports
  - Report Authoring training

Contact advantage@concur.com for information

mailto:advantage@concur.com

Available Training Services

Training Materials

- You will receive standard training materials with your purchase of Concur's solutions:
  - Deployment toolkit
  - Training toolkit – simulations, quick-start guides, FAQ's

Expense Back Office Training

- Covers commonly used Expense Admin tools
- Open enrolment – one to many
- Delivered at no additional cost
- Attendance not restricted – clients can attend as many times as required
- Complements existing online training simulations

Reporting Training

- Open enrollment – one to many; delivered monthly – at no additional cost

Available Training Services

What can Learning Services do for you?

- Additional Purchasable Services
  - End user training
  - Classroom reporting training
  - Customized instructor-led training
  - Customized training materials

Interested in more? Check out Concur's Premium Training Services

(http://www.concurtraining.com/customers/concur/TrainingToolkit/documents/Training_Services_ClientOfferings_NA.pdf)

- Offering customized training solutions to meet your needs (estimated fees listed)
- Instructor-led training is available for clients who want a more hands-on approach to training (delivered onsite or by webcast)

Contact Learning Services at: training@concur.com for more information

Thinking Ahead…..

3 Key Areas

1. Training Toolkits – promote the importance of the available training
   - Watch the online training videos
   - Customizable training page within product
   - Register for back office training
   - Register for reporting training
   - Attend the customer support webinar
2. Early preparation of UAT and end-to-end testing
   - Prepare test plan and test scripts that caters for business requirements validation
   - Testing team members are ready to start (align with the project plan timelines)
3. Ensure deployment planning is in place
   - Prepare countries for go live
   - Provide internal change management notifications early

Access to the toolkits is located at:

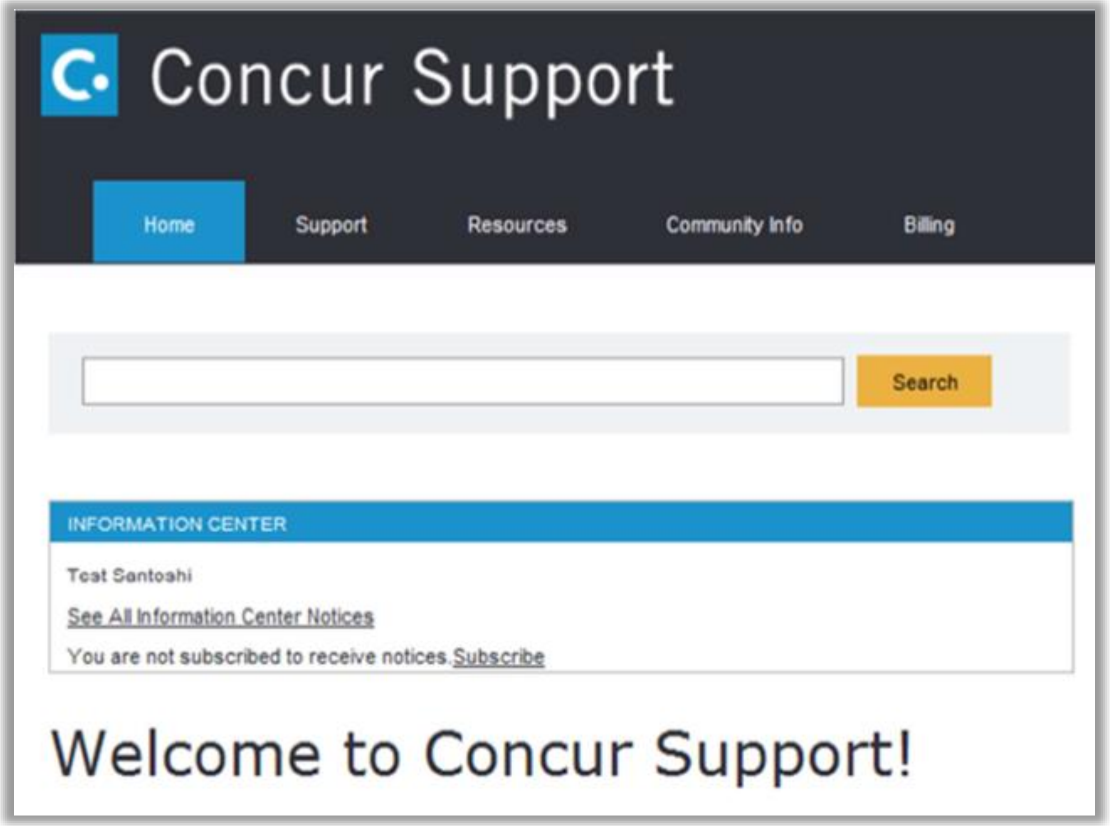
- Deployment Toolkit: http://www.concurtraining.com/prdeployment/expense/welcome
- Training Toolkit: http://www.concurtraining.com/pr/

Post Implementation

Support & Account Management

Use Customer Support for:

- Viewing & downloading your invoices
- Submitting billing enquiries
- Contacting Concur support post implementation
- Accessing the Resource library
- Viewing regular updates on existing & new features



Use Account Management for:

- Additional services and general account questions
- Managing your ongoing relationship with Concur

Post Implementation

Managed Services

Service Administration:

- Provides post-deployment support by a dedicated resource who is responsible for managing and maintaining your system

Managed Reporting:

- A complementary service to Concur Intelligence that provides client-specific reports that are developed and managed by experts with the Concur data-model experience

User Support Desk

- Provides supplemental support directly to your employees

Audit and Receipt Handling

- Provides dedicated resources to verify and substantiate employees' expense receipts and ensures the appropriate level of compliance and control

Outlining the Rollout Options

Big Bang (All at Once) vs. Phased Rollout

Big Bang

- All users go live at once
- Good option for:
  - Smaller companies with one operating unit or located in one country
  - Companies with one company card feed

Pros

- Can quickly abandon old processes
- No need to manage schedule or meet phased rollout dates

Cons

- Lots of users going live at once can be more difficult to manage and support
- Harder to resolve problems in new processes

Phased

- Users go live one group at a time
- Best option for large companies with many business units or operating in multiple countries
- Easier to implement for customers that use multiple company card feeds

Pros

- Allows power-users to discover possible issues
- Smaller user groups and rollouts can be easier to manage
- Users in early rollouts can mentor those in later rollouts

Cons

- Company must simultaneously run old and new processes
- Later groups may be resistant if early groups experience challenges

Multi-Country Rollout Options

Customer-managed Deployment

Expense – Advanced Configuration Training

- For customers who want to self-configure future countries
- Aligned as part of the initial implementation
- Follows a customer-specific global template foundation
- Provides Concur consulting support for complex or legislative requirements
- Customer owns the rollout plan
- Cost effective, global approach
- Reduces configuration and testing time
- Simplifies ongoing maintenance

Concur-supported Deployment

Customers can purchase the following services:

- **Multi-country Implementation** – deploy up to 4 countries in a single phase
- **Single-country Implementation** – deploy 1 country at a time
- **Time & Material** – to assist with self-configuration type of projects

NOTE: Additional Travel implementations always require Concur involvement

Multi-Country Planning

Phase One
Countries 1 - 3

- **Design**
- **Configuration**
- **Validation**
- **Prod Availability**
- **Handed to Support**

- Configuration signed off
- Transition period
- Concur prepares production
- Client scoping internally on next phase
- Documentation of global design template

Phase Two
Countries 4, 5, 6 & 7

- **For next phase Concur reviews updated design**
- **Gap Analysis – 80/20 rule**
- **Configuration, validation, and deployment**
- **Multi-Country Implementation – single Concur resource**
- **T&M – Concur PM & FC**

Lessons Learned Workshop

- **The Lessons Learned workshop is held to determine the correct rollout approach**

Comparing Premium and Professional Implementations

Professional vs. Premium

Professional	Premium
Team: Regional and Business Unit aligned	**Team:** Global and Regional (Americas, EMEA; APAC)
Cost/Timeline: Fixed Setup Fee based on transactions / 2-3 months duration	**Cost/Timeline:** Time & Materials with statement of work / 4-6 months duration
Resources: Single resource – Implementation Project Manager	**Resources:** Project Manager + Functional Consultant (optional Design Specialist)
Engagement: 100% remote (onsite for Large Enterprise under discussion)	**Engagement:** Onsite capable. Flexible, based on statement of work
Country Scope: Limited to a max of 3 in the initial phase	**Country Scope:** Number of countries is flexible, based on agreed scope

Professional vs. Premium

Professional	Premium
Methodology: Fixed scope, template-based methodology approach	**Methodology:** Flexible and adaptable methodology approach
On-boarding: Delivered by a separate pre-implementation team	**On-boarding:** Managed by the Premium implementation team
Design: Excel CDW (Design document/addendum optional)	**Design:** Detailed conceptual design documentation
Site Setup: Production entity only (all configuration in the production site)	**Site Setup:** Production entity only (all configuration in the production site)
Expansion: Managed by separate expansion team	**Expansion:** Lessons learned – continuous engagement for rollout

End of the Day Wrap-up and Q&A

CONCUR