Overview of the Onboarding Process

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Agenda

- Introduction to Onboarding
- Discussing the Sales-to-Service process
- Presenting the *Onboarding/Welcome to Concur* call
- Demonstration of the Kick-off call presentation
- Overview of the Customer Design Workbook (CDW)
- Collecting other customer-specific information and data

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Introduction to Onboarding

- The goal is to complete the Onboarding process within 10 calendar days
- There is a process to manage customer delays
- Within each Service Account Team (SAT), which is determined by a customer's location, edition, size, and vertical, a Service Coordinator (SC) is assigned to onboard a customer
- The basic Onboarding process is:
  1. Internally, review, and validate the **Sales-to-Service** information
  2. Send the **Welcome** letter with the **Customer Design Workbook** (CDW)
  3. Hold the **Onboarding/Welcome to Concur** call
  4. Receive the completed **CDW** from the customer
  5. Transition the customer to Service Delivery (Implementation)

Discussing the Sales-to-Service Process

- The internal process to review all sales-to-service information includes:
  - Reviewing the Sales Order form:
    - Confirming individual services are purchased
    - Confirming the deployment method (Professional, Premium, etc.)
    - Reviewing the discovery notes to understand the customer's purpose for implementing Concur or other information included by the sales rep
  - Reviewing the Sales-to-Service document to confirm the following details:
    - Location of the core project team, language requirements, and which countries to deploy
    - Travel – name and contact info of the Travel Management Company (TMC)
    - Timelines – targeted go-live date
    - Additional notes – location of data center, credit card requirements, accounting systems involved, etc.
  - Setting up the project:
    - Reviewing and finalizing internal projects

Presenting the *Onboarding/Welcome to Concur* Call

- Confirm the service was purchased according to SOF

- Review billing terms

- Introduce the Deployment Toolkit

- Overview of Implementation, including detailing Implementation expectations, timelines, and commitments

- Answer outstanding questions regarding the CDW

- Verify Credit Card and TMC (Travel Management Co.)

- Discuss Next steps

Demonstration of the Kick-off Call presentation

Demonstration of the CDW

Overview of the CDW

- The CDW captures customer-specific information that is applied to their configuration

- Completing the details on the following CDW tabs :

Expense	Travel	Invoice	Other
General Info	Travel Info	Invoice Expense Types	Audit
Expense Types	Travel Policy	Financial Information	Travel Allowance
Financial Information	Travel Vendors	Invoice Approval Flow	Request
Approval Flow		Vendor Management	VAT
Employee Reimbursement		Capture Processing	List Import
Company Card		Purchase Request PO Process	
Miscellaneous			

- Reviewing the CDW – Quick Start Guide

Other Customer-specific Information and Data

- Confirm the master data requirements for Employee and List imports:
  - Employee/HR
  - Cost object

- Confirm the following details for credit cards:
  - What is the type of card – VISA, MasterCard, American Express, Diner's Club, etc.
  - What is the card payment type – IBIP, IBCP, CBCP, etc.
  - Is the customer's bank a Concur partner
  - In which country will the card be issued

- Identify the following Travel and TMC information:
  - Which TMC that the customer will use, including their contact info
  - Will the Travel be a Direct (Concur) or Indirect (TMC) implementation
  - Which countries are in scope for Travel (including TMC fulfilment for ticketing)
  - Which GDS (Global Distribution System) – Amadeus, Sabre, Worldspan, Galileo, etc.

Exercise 1: Completing the CDW

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Exercise 1: Completing the CDW

- Your instructor will provide you with the materials you need to complete a CDW, based on the requirements of a fictitious company named Fabrikam, Inc. (FKAM)
  - Read the Exercise instructions and then complete the CDW
  - Ask your instructor questions as needed for clarification

End of the Day Wrap-up and Q&A