



# Welcome [Client Name] to Concur!



## Travel & Expense – Professional

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XX XXX 2016

# Pre-Implementation Agenda



- Confirm Services Purchased
- Implementation Expectations
- Prepare for Implementation (*Deployment Toolkit, Training Services*)
- List Import Training
- Next Steps

# Services Purchased

- **Contract Effective Date:** [15 July 2016]
- **Billing Begins:** Monthly billing begins from 3rd Calendar Month from contract effective date ie: [October 2016]
- Contract Includes:
  - [Travel and Expense with Triplink]
  - [Intelligence for Travel & Expense]
  - [Concur Request Add-on]
  - [User Support Desk]

Implementation Scope – each contract covers a single implementation phase with the maximum number of configuration components (3 Configuration sets, 3 VAT, 3 Credit Card setups,) as specified in the Services Description Guide (obtained from Sales).

**\*\*Note** - Any implementation work after the initial deployment will require a contract addendum and additional implementation fees.

# Implementation Overview

## Requirements and Analysis



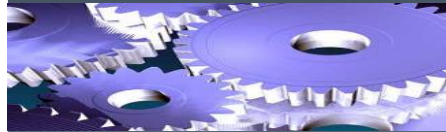
Participate in Project Design/Strategy Session

Establish Requirements Design

Technical Preparation:  
Set up file transfer

Finalize Milestone Project Plan

## Configuration, Review & Validation



Deliver initial configuration for validation and testing

Training and Set-up of import/export interfaces

Administrator and Project team training

Confirm final configuration

## Deployment



Execute end-user training and change management plan

Prepare Production Environment

Go Live – execute roll out to end users

Monitor and Support Go Live

## Transition



Introduction to Concur Client Support team

Complete Transition to Concur Client Support

Complete Implementation Survey

# Let's Talk Project and Getting Started

- You will hear from an Implementation Project Manager (IPM) in the next 2 weeks from when our call is completed
- You will start working on some key project tasks after our call today
  - Complete action items that result from today's discussion
  - Review documentation and videos on the Deployment Toolkit
  - Work on assembling your project team, if you haven't already
- Project Timeframes
  - Estimated Expense production site availability for users: 4-6 weeks from Design Call.
    - 10-12 hour commitment per week from your team
  - Your Concur IPM will develop a detailed, custom project timeline based on your scope and the services you purchased
  - Desired go live date in mind?
  - Anything we need to workaround (vacations, projects) based on your project teams availability?

# Best Practice Implementations...

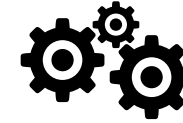
- Have at least 2 resources from your project team on every call
  - You want to have enough resources to cover unforeseen circumstances
  - Ensures 2 people from your organization are knowledgeable of Concur to help drive decisions, train end-users and support the system
- Have a deployment strategy in place
  - Plan to schedule your deployment soon after your site is ready for production
  - Communication plan in early stages, training end-users, etc.
  - IPM can help you answer end-user questions before you deploy
- Follow the project timeline
  - Timeline agreement will take place on your Design Call
  - Any major changes or delays can impact the overall momentum & project team assignment

# Other Key Items to Note...

- Planning for internal technical resources
  - If you plan on integrating/automating the Standard Accounting Extract file into your financial system, you will want to align internal technical resources – *further discussions will commence with your Implementation team*
  - **Your IT team are responsible for downloading the SAE from Concur to your network and creating an interface connection in order to load the SAE into your system**
- Project delays
  - Whether unexpected or expected delays (vacations, other projects, etc.), please let us know if members of your core team or IT resources will be out of the office. We have a process in place should you encounter delays.
  - Successful implementations result from a commitment to the project, the timeline, and completion of implementation tasks



# Preparing for Implementation



We realize that Concur is not your only job and for that reason we have a Deployment Toolkit to help you through your implementation

- Deployment Toolkit - <http://www.concurtraining.com/prdeployment/> To get started please review within Expense
  - Getting Started
    - Implementation Overview Guide
  - Analysis & Design
    - Step 1 > Technical Team
      - Secure Data Interchange, Technical Overview (*IT/Tech*)
      - Supported Web Browser Configuration (*IT/Tech*)
      - Shared Technical Services Video (*Core Team*)
      - Specifications and Templates (*Core Team and IT/Tech*)
  - Deployment and Transition
    - Step 1: Review Change Management Guidelines
    - Step 2: Prepare Your Organization
- If you have additional time to explore? We recommend that you check out the videos under the Functional Team, (end User Training), section of [Analysis & Design](#) and the [Configuration and Validation](#) section.

# Training



- Interested in customized training or having Concur come onsite?
  - Check out Concur's Learning Services
    - Customized training solutions to meet your needs (fees are determined by Learning Services based on what they do for you)
    - Change management consulting or instructor-led training (delivered onsite or via webcast)
  - For more information contact Learning Services at: [training@concur.com](mailto:training@concur.com)

# List Import Training

- Get a jump start on your project
  - Start gathering some important data in preparation for your initial call with your Project Manager
- Additional information may be needed on your templates after site configuration
  - Implementation will provide information after your initial call

# Next Steps

- Complete list import templates
- Core project team to review Deployment Toolkit  
<http://www.concurtraining.com/prdeployment/>
- Company logo
  - Please provide us with a logo that meets the following requirements:
    - 55 (height) x 200 (width) pixels
    - File size max 100KB
    - Format GIF or JPG

# Thank you for partnering with Concur!



Questions?

## On your way to a successful Implementation!!