NEXPENSE

A take on solving the expense claim madness

PHIL WORNATH | FWDPay

The design challenge

- **Business expenses** are on the rise from year over year - But many employees have a broken relationship with their expense management.

*“Let’s get rid of manual **expense reporting**”*

Meet Emma!

Emma, 27

Junior Project Manager

What Emma enjoys

Business trips

"Once the paperwork is done, I can finally get to work and enjoy the trip"

Business lunches

Signing business contracts in lunchtime nothing else to worry about, right?

Taking a cab

Safe and fast to the next business meeting. But does it save time prior her public transport ticket?

Emma's nightmares

Policies and processes

*"Instead of wasting time with **policies** and having 5 calls, I would **prefer to just book***

Splitting up restaurant bills

*"Splitting is a pain - I would like an option to **split up costs between each employee** even*

The manual paperwork

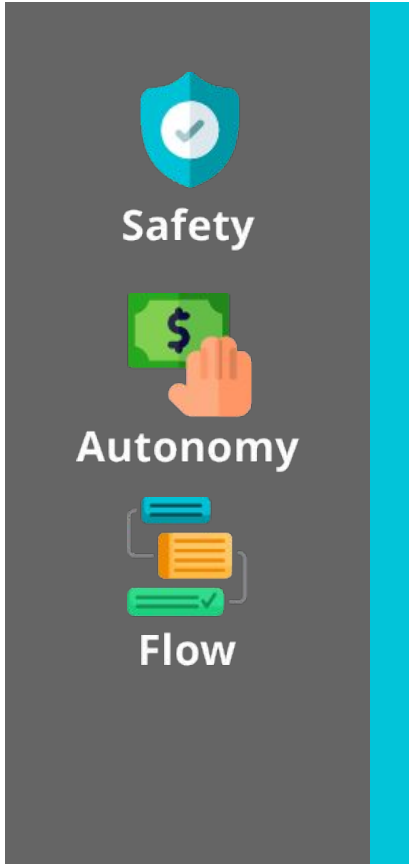
*"**Printing the digital receipt** for my 13 mins cab ride adds time for me and the back office - that's not what it should be like"*

Valuable Insights

#1 Users like the idea of a **booking portal** - but there are still too many manual expenses they fear, so **let's find a flexible way in between**

#2 Users tend to **procrastinate with their expense claims**, so let's focus on a guiding flow

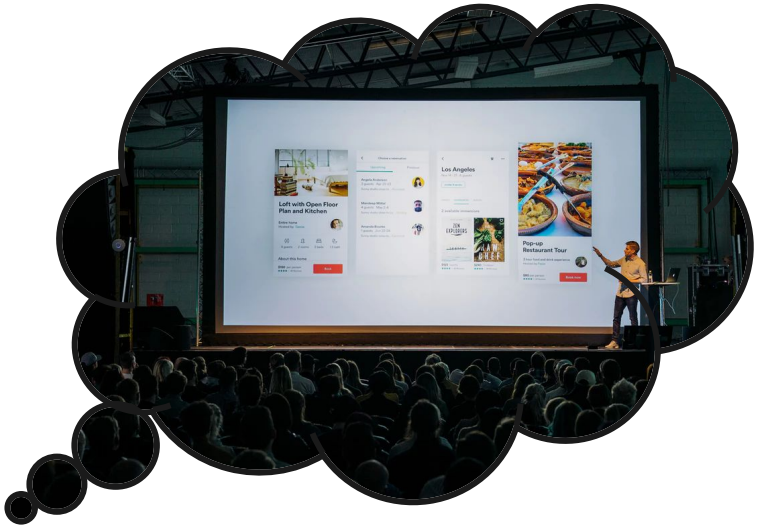
#3 Opening expense claims **feels like begging, so let's give the user more autonomy**



A big day for Emma!

June 20, 2019 - 4:31pm

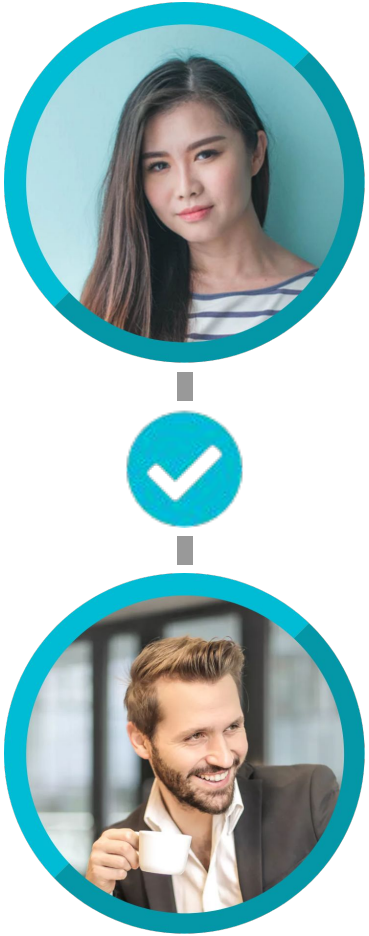
- **Emma** wants to join a big conference
- But it is already tomorrow



A big day for Emma - granted!

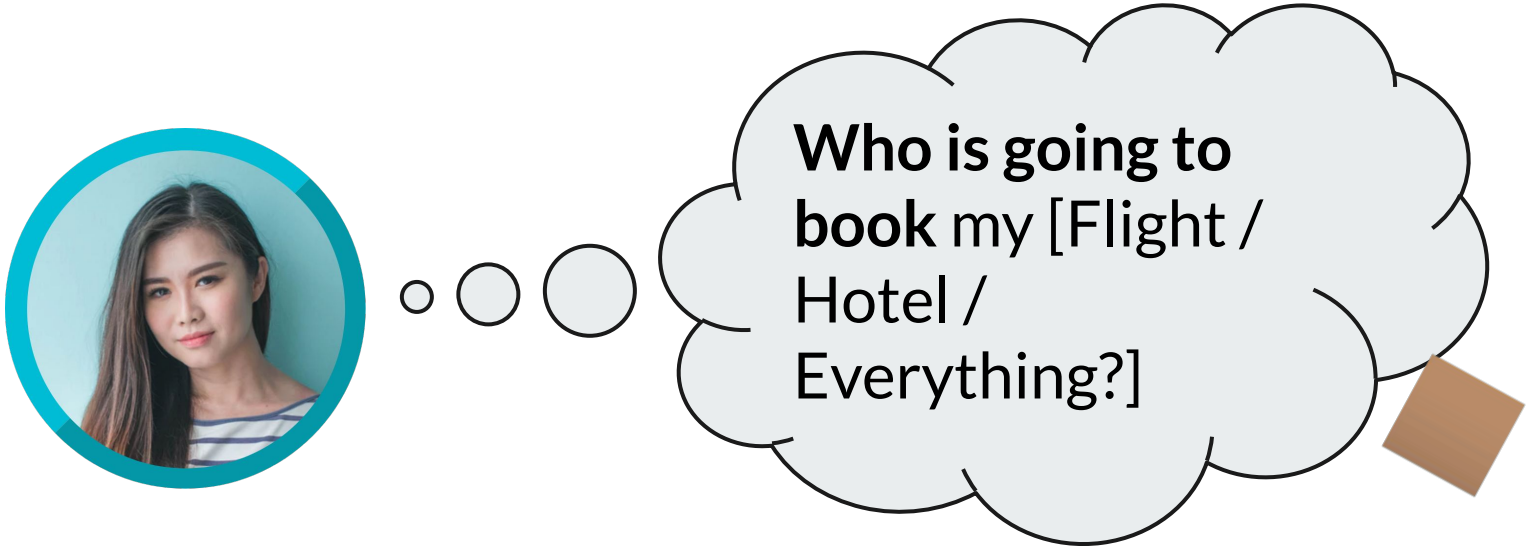
June 20, 2019 - 7:02pm

- **Emma's** Team lead just **granted her to join** the conference
- But the conference is still tomorrow...

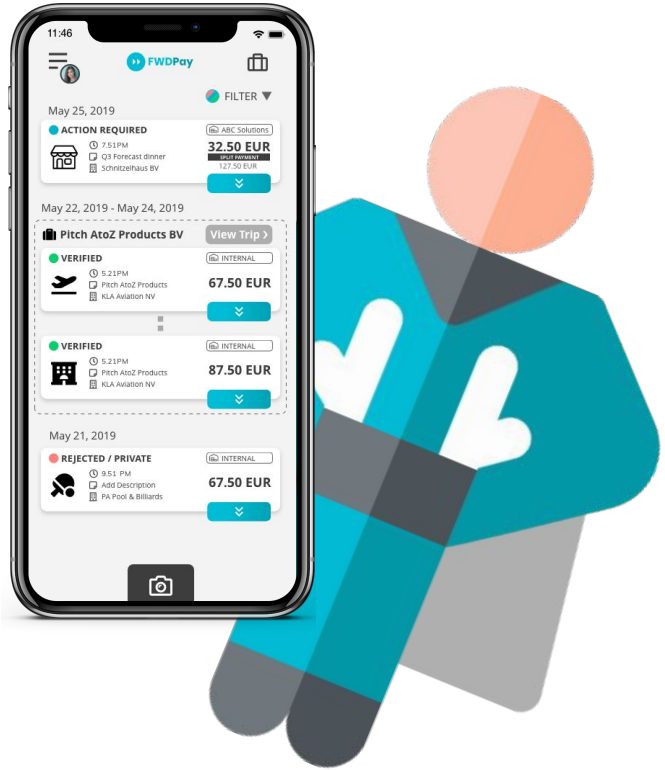


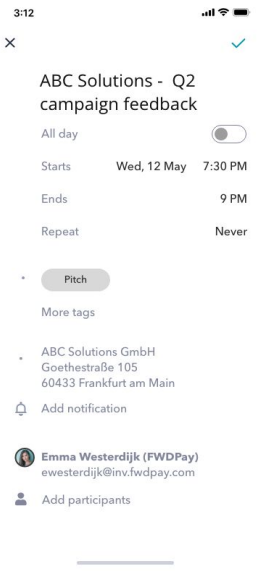
A big day for Emma - but there is a problem!

- The colleague responsible for business trips already went home

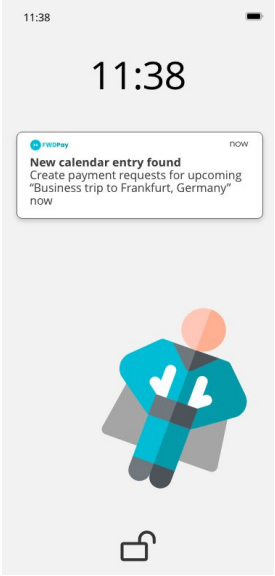


Think FWD!

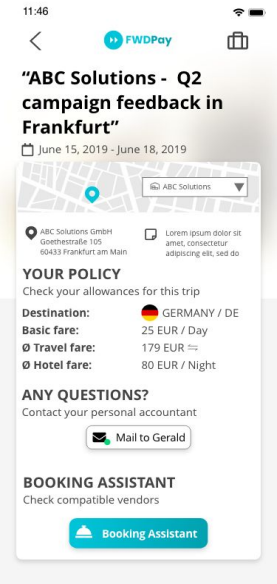

11:46
FWDPay
FILTER
May 25, 2019
ACTION REQUIRED
ABC Solutions
7.51PM
Q3 Forecast dinner
Schnitzelhaus BV
32.50 EUR
SPLIT PAYMENT
127.50 EUR
May 22, 2019 - May 24, 2019
Pitch AtoZ Products BV
View Trip
VERIFIED
INTERNAL
5.21PM
Pitch AtoZ Products
KLA Aviation NV
67.50 EUR
VERIFIED
INTERNAL
5.21PM
Pitch AtoZ Products
KLA Aviation NV
87.50 EUR
May 21, 2019
REJECTED / PRIVATE
INTERNAL
9.51 PM
Add Description
PA Pool & Billiards
67.50 EUR



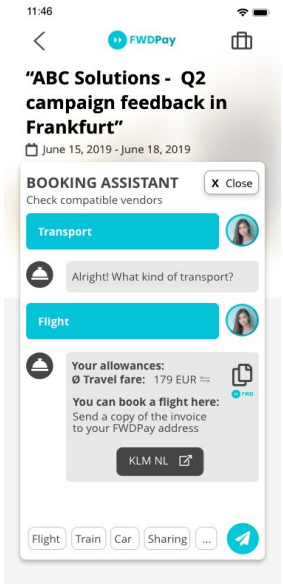
#1 Add calendar entry (Sync or invite)



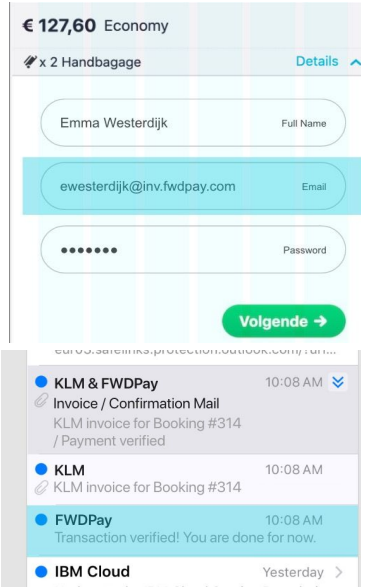
#2 FWDPay Notification shows new event



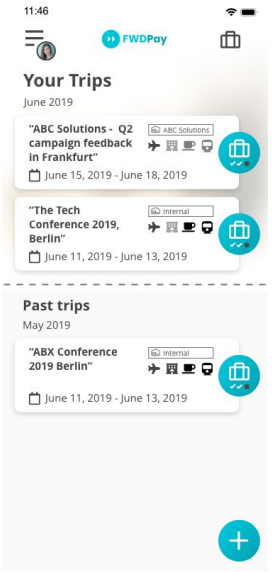
#3 Trip detail page shows individual policy



#4 Booking assistant checks policies & vendors



#5 FWDpay email processes booking - **DONE!**



#6 Booked flight shows up in overview

Successful networking day for Emma

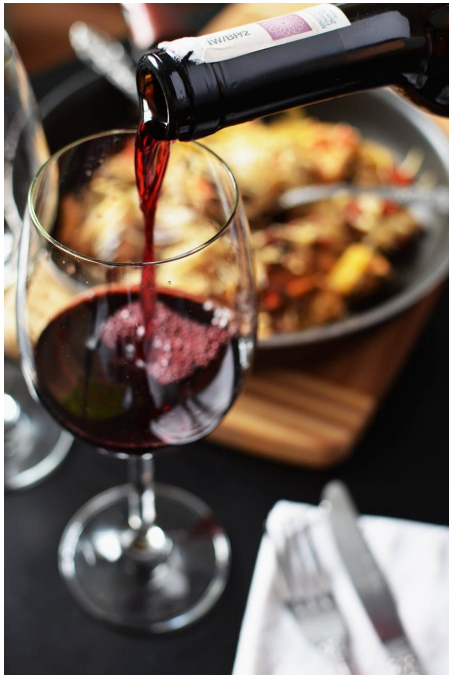
- **Emma** just met **Lisa** from *[insert valuable potential client here]*

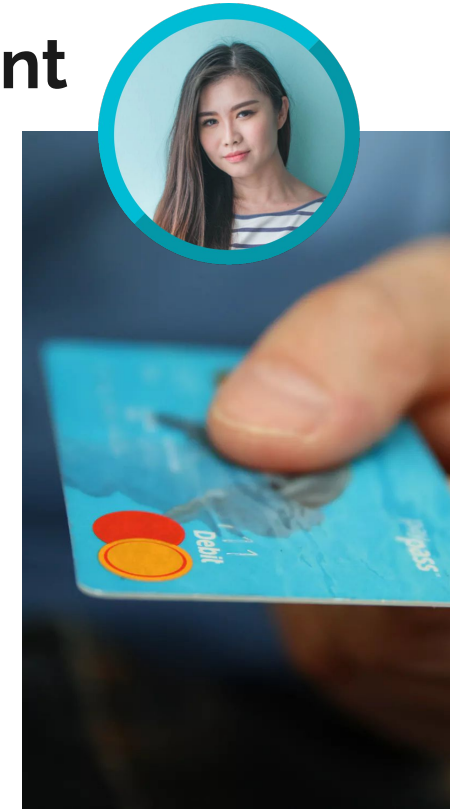
The conference dinner

Wanna grab a bite for dinner?

Sure! But how do we split?

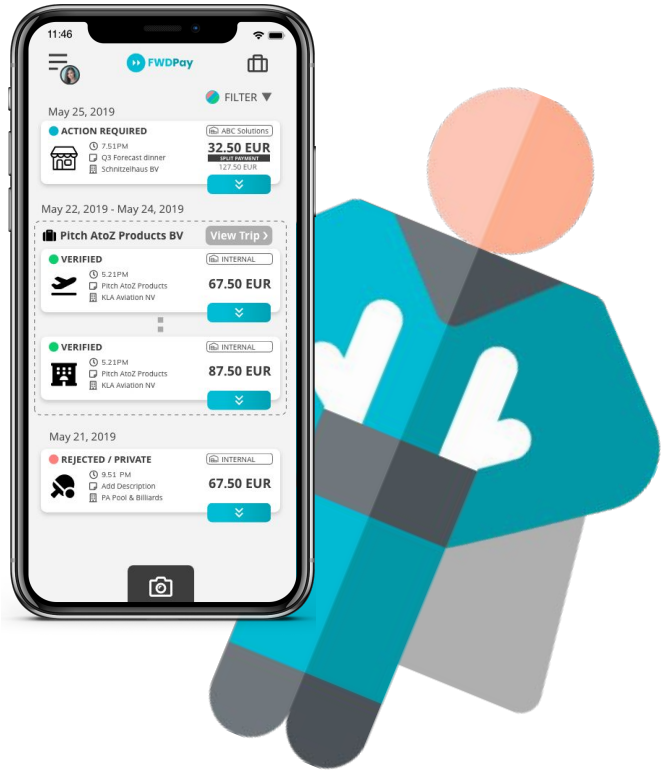
Emma and Lisa at the Restaurant





Emma pays using her FWDPay card

Think FWD!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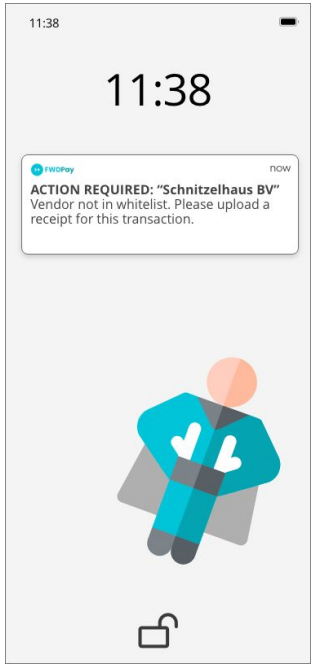
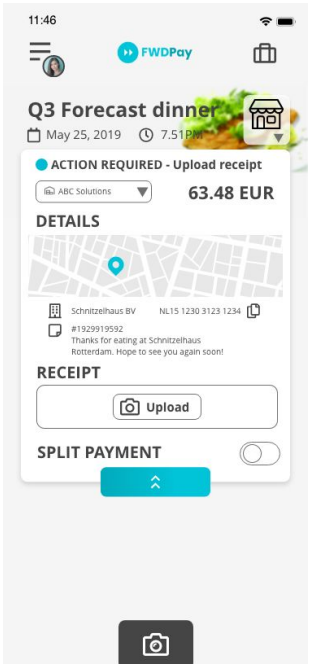
May 21, 2019
REJECTED / PRIVATE
INTERNAL
9.51 PM
Add Description
PA Pool & Billiards
67.50 EUR



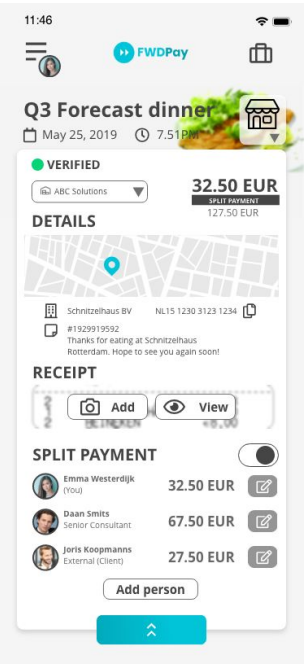
#1 Notification for transaction, request to upload receipt



#2 Transaction view with option to upload receipt

#3 Camera view with OCR detection

#4 Comments can be added to the transaction



#5 Split with external person (automatic invoice) **- DONE!**

There is more...

Thanks for the good cooperation during the process! Please find the full prototype below:

View Prototype online

In the case, you are planning to invest, just let me know !

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