

Driving effective strategies for travel and entertainment automation

Today's business traveller, more than ever, is driven by personalisation, efficiencies and convenience. Whether they're waiting to check in bags, queuing to get through security or relaxing in the airport lounge, they'll be engaging with some form of technology while they wait to board their flight.



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As procurement managers battle to get their travelling staff to toe-the-line and comply with policies, the convenience that business travellers enjoy in their personal lives now needs to be delivered in their business life to ensure compliance.

Outdated processes and technologies to reconcile travel and entertainment (T&E) expenses, such as manual filing of expense reports is time-consuming for the modern business traveller, meeting resistance and impacting the company's ability to keep track of its T&E spend accurately.

By automating your T&E reconciliation, procurement managers can drive compliance without the need for manual processes and checks, which would improve spend visibility and control, freeing up your staff to focus on more strategic tasks – whether they're the travellers driving business or the back office staff processing expenses.

The benefits of T&E automation

The key is to make it easy for travellers to comply with your company's T&E policies. Automation helps to do this by allowing them to submit their receipts electronically in situ so that they don't lose their receipts and to get reimbursed quicker.

The benefits of T&E automation for staff are clear, but for the business itself, there are further opportunities to save costs by improving T&E policy compliance, increasing spend visibility and making auditing more efficient.

The future of T&E expense reporting lies in cloud-based and mobile apps.

“Despite an increase in T&E automation, many businesses are still not deriving the benefits they could be. Companies are still using manual processes for their T&E reporting when there are several automation options that would fit various company requirements – big and small. Often the greatest hurdle to automation within companies, however, is committing to it in the first place, even if there is recognition of the benefits it brings. Think of the cost involved in processing all your expense reports monthly, as well as the time you could save and the errors you could avoid by choosing to automate,” says Ian Hendry, commercial card product manager at Nedbank.

Hendry warns, however, that automation isn’t achieved by simply implementing an expense management system. “Too often companies that decide to automate end up implementing a system and try to digitise their existing processes. For automation to be successful, automation needs to be at the core of the business and applied consistently throughout the organisation, reengineering expense processes and workflows for the benefit of travellers and back office staff.”

Ways in which you can automate your T&E spend reconciliation

- **Play by the same rules.** Automation only works if everyone is on board, from your senior management right down to your most junior accounts clerk. Ensure that stakeholders not only buy into automation but that they also fully understand what is required and how processes are going to change.
- **Use one platform.** For greater visibility and efficiency ensure that you are using one platform, not a silo approach or multiple processes.
- **Decide how to automate.** You will need to assess your current process to see where there are opportunities to automate and ensure that you get feedback from all stakeholders, not just the back office staff who will be implementing it.
- **Run a pilot programme.** This will allow you to iron out any issues before your roll out the new T&E processes and automated reconciliation to all stakeholders.
- **Roll out your plan.** Devise a comprehensive plan on how to roll out the new system to all stakeholders. There will be those who want to stick to Excel spreadsheets, so you’ll need to preempt some resistance. Setting milestones to your end target is a good idea so that you evaluate your progress consistently.
- **Use your data strategically.** Now that you have greater visibility over accurate T&E spend, consider how you can use this data for strategic goals, including negotiations with suppliers.