

Team Intelligence: Leveling up a successful, global e-commerce corporation

CHALLENGE

- Reduce time spent reviewing expense reports
- Reduce employee reimbursement time
- Simplify spend management across complex global teams and reporting hierarchies
- Enforce individual and team policy compliance

SOLUTION

- AppZen Team Intelligence App

RESULTS AND BENEFITS

- Significantly reduced expense report reviews
- Eliminated blind approvals of expense reports
- Empowered managers with team spend insights
- Reduced employee reimbursement time by 75%

INTRODUCTION

This large, multinational conglomerate is a technology leader with core businesses that include e-commerce, cloud computing, digital streaming, and artificial intelligence. With annual revenue in the hundreds of billions, this corporation operates in over 50 countries and reaches an online population of more than 1B people. It has over 1M employees worldwide, organized into thousands of global teams and departments.

THE CHALLENGE

In this globally distributed organization, team reporting hierarchies are typically complex. Managing T&E expenses presents significant challenges for team managers and finance leaders. More importantly, with over a million employees, it was very time-consuming for managers to review each team member's receipts to ensure they were in compliance with company policies. This led to managers blindly approving over 80% of receipts without a proper review. There was no visibility around team spend across disparate locations, nor around the impact of wasteful or non-compliant team and employee spend on the corporation.

It was imperative to the organization to find solutions to the following problems:

1. Remove managers from the time-consuming need to check direct reports' individual expenses across multiple geographies and currencies, while enforcing corporate controls and SOX compliance.
2. Find an easy way for managers and finance leaders to quickly review their teams' spend so they could track trends and exceptions, benchmark their team's expenses against department budgets, and quickly identify employees' high-risk spend in order to take immediate action.

THE SOLUTION

AppZen's Expense Audit technology was already helping customize policies to meet changing business needs, realize major cost savings, and increase efficiency across the entire T&E operation. This organization is known for pushing the envelope, however, and wanted to drive even greater productivity. With over 250,000 expense reports sent for processing every month, this challenge required an innovative solution. AppZen Team Intelligence was implemented across all global locations so managers could accurately monitor individual and overall team spend across various currencies, business units, and regions — all from a single dashboard.

The Team Intelligence dashboard contains 10 different charts and graphs highlighting detailed metrics for both teams and individual staff members, such as category spend per team member or how much spend was high-risk, based on company policies. Team Intelligence also allowed the organization to customize data, including: *date range, manager, cost center, report status, organizations, policies, payment type, and direct reports*. This single source of truth provided on-demand analysis of all teams' spend within the organization, with drill-down capabilities to pinpoint anything that was out of policy. Managers were also sent monthly email reports, highlighting their departments' highest-risk spenders. By proactively catching anomalies, managers and finance leaders could take immediate action to enable the appropriate expense workflow for remediating and reducing non-compliant spend before it became a problem.

RESULTS AND BENEFITS

Implementing AppZen Expense Audit and the Team Intelligence App gave managers and finance leaders a focused awareness of their team's overall spend and its impact on the organization. In six months, the organization effectively eliminated blind and negligent “rubber stamp” approvals. Because Expense Audit thoroughly examines 100% of expenses, automatically approves low- and medium-risk expenditures, and flags high-risk items for review, managers could focus on the most significant areas of spend. Team Intelligence also allowed the company to:

- Remove the need for manager approval from the workflow for low- and medium-risk expenses, while maintaining spend controls and compliance with a high degree of accuracy, giving managers more time for effective leadership.
- Become Finance SOX compliant with automatic receipt approval.
- Meet the CFO's initiative of reimbursing employees faster. Repayment time decreased 75%, from an average of 7 days down to 1.81 days — 2x times faster than the industry average.

Through Team Intelligence, the organization now has one source of truth that reflects overall spend across every one of its global teams — all accessible via a single, on-demand dashboard.