



SAP Concur 

SAP Concur Case Study

Concur Expense | Concur Travel | Concur Invoice | Consultative Intelligence

Simons Foundation Transforms Its Entire AP Operation with SAP Concur Solutions

Moving from a paper-based to an electronic invoice and expense process improves efficiency, accuracy and the user experience.

Quick Facts

Company Name

Simons Foundation

Solutions

- Concur® Expense
- Concur® Travel
- Concur® Invoice
- Concur® TripLink
- Consultative Intelligence
- Expense Pay
- Expenselt
- Invoice Processing
- Purchase Requests for Invoice
- Services Admin for Travel and Expense
- Service Administration for Invoice Processing

Industry

Nonprofit/Philanthropic

Company Size

450 Employees

Location

New York, NY

Why SAP Concur?

The Simons Foundation funds researchers taking on some of the world's most complex challenges – however, when it comes to internal operations, the organization strives to keep expense and invoice processes, reduce manual touch points, and provide an excellent user experience for employees, guests and suppliers alike.

ABOUT SIMONS FOUNDATION

Established in 1994 by Marilyn and James Harris Simons, and headquartered in New York, the Simons Foundation is dedicated to advancing the frontiers of research in mathematics and the basic sciences. The foundation is a world leader in supporting initiatives in autism research. The foundation supports these efforts by providing grants to individuals and their projects through academic institutions, as well as supporting teams of computational scientists through its own Flatiron Institute.

SIMONS
FOUNDATION

The Challenge: To Streamline Every Aspect of Its Finance Operation

The Simons Foundation is a non-profit organization with a passion for giving, and a **mission to actively support math, basic science and autism research**. When this New York-based foundation first opened its doors in 1994, its entire team consisted of the two founders and one accounting employee. Today, with over 400 employees, and its own institute for the advancement of computational science, the foundation continues to fulfill its mission and make an impact every day.

Because it is a non-profit organization, its leadership is vigilant about keeping overhead low and efficiency high—**streamlining operations and simplifying processes** wherever possible.

Although the organization had successfully transformed its travel and expense operation years earlier, until recently, its invoice process was still paper-based. The accounts payable team had to pick up the mail, scan it, code it, get approvals, print out checks, then, get them signed and mailed out. As a result, it took about three days to process and pay the 125 invoices the team received every week.

Something had to change.



“We wanted a **cloud-based invoice automation system** that would allow users to submit and view invoices electronically, automate approval workflow, and pay via ACH. Although we looked at other options, we were impressed at how much the solution delivered to the Foundation in terms of the **value proposition and overall functionality**. We knew that they had the technology and insight to help us get the job done.”

Nick Sanghvi, Accounts Payable Manager, Simons Foundation

An Engaging, Inclusive Change Management Strategy

The transformation journey began in April of 2019 and was completed in just six months, thanks to a well-planned implementation and the support of SAP Concur Express.

“We decided to do everything we could to **simplify the process, starting with our three-person project team** driving the bus,” Sanghvi explains. “I led the project and the functional side of it. I’m lucky to have someone on my team who is a technology person, who handled that aspect; and a third person on our team, who is excellent at handling the communications and setting up meetings, and who coordinated all of those logistics.”

The goal? Go from a 100 percent paper-based process to Concur Invoice, a completely integrated, electronic process with automated workflows and total transparency. Sanghvi and team set the tone early by engaging all stakeholders up front. **This approach not only built trust; but ensured that these key users had input into the new process.**

“We started off by inviting about 50 stakeholders to a kickoff meeting where we demonstrated the SAP Concur product and clearly communicated the message that **the goal of the change was to eliminate work—not add it,**” shares Sanghvi. “This was the perfect opportunity to get buy-in and demonstrate that although our team would lead the project, their voices would be heard.”

From here, Sanghvi and staff organized a team of 22 key stakeholders, one representing each of the business groups. These stakeholders participated in monthly meetings where they learned implementation status, what had been accomplished and what would be happening next. In addition, these stakeholders attended two workshops to fine-tune the design of key process flows.

“We kept people engaged and informed every step of the way, and it **paid off very well in adoptions,**” Sanghvi says.



Building on Past Success

Sanghvi had employed this **same change management strategy three years prior**, when he moved thousands of sponsored guests—scholars from different universities who the foundation invites to speak or conduct research—from a paper-based expense process to Concur Expense.

“Many of those same stakeholders who were involved in that transition were also involved in this one. Because it was so successful, **there was already a high level of trust established**,” says Sanghvi. “So, it was a very easy sell to our user community. We had zero pushback.”

The fact that the Simons Foundation was already an SAP Concur customer made making the move to Concur Invoice much easier, too.

“Fifty percent of the work was done when the software was already up and running. Our people were familiar with SAP Concur, they knew how it worked, how to approve, how to use email notifications—everything. All of this helped get people on board very quickly.”

Nick Sanghvi, Accounts Payable Manager, Simons Foundation

NEW PORTAL, STREAMLINED PROCESS AND THE END OF PAPER INVOICES

To **eliminate the existing decentralized and inconsistent supplier setup process**, the Simons Foundation AP team developed a supplier portal using an inexpensive form builder and data (banking, W9, etc.) collection tool (FormStack.)

“We reached out to our 1200-plus suppliers, told them what we were doing, and asked them to submit their update requests, and electronic payment/bank account information on a form through the portal,” explains Sanghvi. “After they got used to that, we instructed them to start submitting their invoices electronically to our centralized AP mailbox.”

One of the reasons the implementation was so “textbook flawless,” even on an accelerated schedule, is because Sanghvi and team didn’t try to reinvent everything. **“We set the framework day one**—what we did today, we will do tomorrow in electronic form,” Sanghvi says. “We didn’t try to overkill it.”

The team did add functionality on the back end to increase the overall benefits of the change. “We worked with the SAP Concur team to add a general ledger validation table within Concur Invoice for account validation,” explains Sanghvi. “This **eliminates the potential for suspense entries** continuing on to the ERP.” If possible, this is highly recommended for small businesses.

The vendor portal also links to Google Sheets and Wipfli, and SAP Concur App Center partner that integrates vendor and invoice data. “With all of these extras, and the accelerated implementation timeline, our implementation cost for Concur Invoice was very low,” shares Sanghvi. **“I can’t imagine why anyone would not want to take advantage of this expertise.** The value is much higher than the cost.

Faster. Easier. Better—for Everyone

IMPROVED PRODUCTIVITY

In the past, the AP department had to stamp, code and manually process each invoice, which often sat in queues, and on approvers' desks waiting for approvals. The process was slow, cumbersome and time-consuming.

“There were about 16 touch points for every single invoice from the time it left the vendor house to when we sent out the check. Now, there are four—it goes through coding, it goes through approval, the CFO signs off and the payment is made by ACH,” Sanghvi says. **“Our OCR accuracy is 95 percent, so, we have very few exceptions or issues.”**

It's a fast process for users, as well. “Now our users can receive, approve and submit their e-invoice, without getting up from their desks,” Sanghvi says. **“Based on our last user survey, everyone loves the change.”**

INCREASED VISIBILITY

By moving to Concur Invoice, as happened with Expense, the Simons Foundation leaders **gain near real-time visibility into the organization's financial data.**

“The visibility into the data we now have is mind-blowing,” says Sanghvi. “The more we see, the better we can update policies, adjust guidelines, educate users or make business decisions.”

For example, prior to launching Concur Invoice, the foundation paid every supplier, every week.

Now, the **AP team has the visibility to pay suppliers on the payment terms.**

ENHANCED CONTROL

Working with SAP Concur consultants, the team developed one, comprehensive report with report writing services, can be sliced, diced and used by multiple leaders throughout the organization.

“They can pull data by supplier, by cost center or the approver. Our accounting team can see invoices submitted in 2020 that should actually have been posted in 2019, and see whether those funds have been accrued or not,” Sanghvi explains. “It's a report, but it functions more like a data mining and analytical tool.”

THE FLEXIBILITY TO PIVOT

At the time of this writing, Sanghvi and team — like most of the world — are working remotely due to the COVID-19 pandemic. Because of the Simons Foundation's electronic workflows, the AP department is “business as usual.”

“If we did not have Concur Invoice implemented today, I don't know how we would pay our suppliers. They would either have to wait for payment, or I'd have to purchase a printer or go to a copy shop, the get checks to our CFO or COO for approval. It would have been a nightmare,” says Sanghvi. **“Because we have SAP Concur solutions, everything is running as smoothly as it would if we all were in the office.** We're feeling no pain whatsoever.”

Long-Term Relationship with Lasting Results

What began as a journey to simplify and eliminate paper processes has evolved into **a partnership built upon mutual respect and consistent results.**

“We were impressed at how much the solution delivered to the Foundation in terms of the value proposition and overall functionality. Every tool we’ve implemented, from travel bookings to mobile expense submissions to Invoice, **has saved us time, save our users time and has enabled us to effectively scale,**” Sanghvi says. “In the last five years, we have grown from 100 employees to 450 employees, the foundation has added a few more divisions and have not added AP headcount.”

Using SAP Concur applications, it was easy to scale and we can do even more with less. Sanghvi’s small, but mighty, four-people staff processes all payments, reimbursements and business transactions, including grants. And they never miss a beat.

“Today, **we are close to 98 percent electronic.** If we didn’t have our SAP Concur tools, we would have had to hire two more people to handle the volume,” explains Sanghvi.

But, don’t think for a moment that Sanghvi’s work is done. He is continually looking for ways to improve by saving time and reducing costs, to make life easier for his users, **so they can continue to focus on the Foundation’s mission.**

“We have a great relationship with SAP Concur,” shares Sanghvi. “The people there are outstanding and responsive to our needs.”



NUMBERS TELL THE STORY

- Electronic invoice submission and processing reduced the AP department's manual touch points per invoice from 16 to four.
- Users and the AP team are saving approximately 100 hours a month on the overall invoice process.
- OCR accuracy for invoices (5,000+ documents) is 95 percent.
- 98 percent of Simons Foundation's suppliers now accept payments via ACH, whereas 100 percent received payments by paper check before. A huge turnaround in just eight months.



ABOUT SAP CONCUR

SAP® Concur® solutions simplify expense, travel, and invoice management for greater visibility and control. For more than 20 years, these leading, innovative solutions have kept customers a step ahead by delivering time-saving tools, connected spending data, and a dynamic ecosystem of diverse partners and apps. User-friendly and business-ready, SAP Concur solutions unlock powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively. For more information, visit concur.com.



EXPENSE EFFICIENCY

Travelers and guests can capture receipts and submit expense requests electronically from their mobile devices. Everything flows through the approval and reimbursement process with time to spare.



INVOICE EFFICIENCY

Moved from a decentralized, paper-based system to a centralized process with ACH adoption of 98 percent. The AP department, COO and CFO have dashboard visibility into what has been processed, and what invoices are in the pipeline, to more effectively manage cash flow.



USER SATISFACTION

Surveys show that users benefit from these changes, as well, enabling them all to focus more on the Simons Foundation work, and less on administrative tasks.

Learn more at concur.com

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