

# Study Group on course for continued growth with expense automation and insight

The rollout of Concur expense management and reporting tools coupled with an expansion of Study Group's American Express corporate card program has resulted in a greater degree of control and insight into spend management.

## About Study Group

Study Group is a global leader in the education industry, operating its own colleges and partnering with universities to prepare students for academic success and rewarding careers. In 2014, Study Group enrolled more than 63,000 students from 170 countries. In Australia, Study Group partners with universities including the Australian National University, Charles Sturt University and University of Sydney. The company also operates its own educational institutions including the Australian College of Physical Education (ACPE), Australian Institute of Applied Sciences (AIAS) and Martin, a college with four separate campuses. The company has grown rapidly in Australia in the past two years through acquisition, most recently acquiring Endeavour College of Natural Health in early 2015.

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*Ricson Cenidoza, Study Group's Assistant Manager Shared Services*

## Rapid growth, increasing diversification

Study Group operates a shared services model to manage the financial systems and processes for its operations in Australia, extending to a number of locations across the Asia-Pacific. It's a highly complex organisation, with over 100 cost centres representing a range of business units and brands across multiple campuses. With its rapid growth and increasing diversification, the manual processes that Study Group used to manage expenses had become “a complete and utter nightmare” explained Rita Shelton, Study Group's Head of Finance Shared Services.



### Company Name:

Study Group

### Solutions

American Express @ Work® Reporting

American Express Corporate Cards

American Express Corporate Purchasing Card

Concur® Expense

Concur® Expenselt

Concur® Audit

Concur® Business Intelligence

### Industry

Education

### Company Size

1300 staff

### Location

Australia

### Why Concur and American Express?

- Automation and consolidation of manual expense processes
- Integration between systems and with ERP backend
- More detailed and accurate reporting and data analytics
- Increasing level of spending compliance
- Improving user experience and reimbursement process

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Rita Shelton, Study Group’s Head of Finance Shared Services

“People would send in their receipts, and there was a manual expense form to complete and have signed by their manager. We had no controls in place, we couldn’t monitor what people were spending, there was no timely capture of spending, so no true reflection in the P&L, and we couldn’t validate spending against policy or even build enforceable policy rules,” said Shelton.

Study Group also had only a limited number of corporate cards in use across the organisation, relied on spreadsheets, and manually checked each expense claim, line-by-line. It was difficult to assign costs to the appropriate business units and cost centres, difficult to correctly apply GST and FBT to expenses, and manual re-keying of data into Study Group’s ERP system was time-consuming and prone to human error.

### Automation, accessibility, visibility, convenience

With significant growth in Australia and across the region, Study Group realised that its manual processes for managing travel and expense were quickly becoming unsustainable. In choosing Concur, Study Group gained the automation the company needed to streamline its travel and expense management, and accounts payable processes. At the same time, individual users were given the advantage of an intuitive online expense system, accessible anywhere and anytime – including from users’ mobile devices.

“Our users really like Concur’s mobile app, it’s much easier and saves them so much time,” said Shelton.

By making life easier for staff, user acceptance of the new Concur system has been rapid and very positive, to the point that the Shared Services team now has to manage demand from the business for new functionality and greater access to the system.

“With the head of college accepting the Concur technology, we’ve got the buy-in from everyone who reports into that person,”

Study Group also expanded its corporate card program, issuing American Express travel and expense cards for over 200 of the company’s staff in Australia. An American Express procurement card was implemented for larger corporate expenses, such as insurance, and an American Express Business Travel Account (BTA) established as a centralised account to charge costs for individual staff members without a corporate card.

The widescale use of American Express for travel and expenses has given Study Group far greater control and visibility of spending across the organisation. It’s also made life easier for individual users.

Ricson Cenidoza, Study Group’s Assistant Manager, Shared Services highlights a recent innovation that enables users to integrate an American Express card with Apple Pay, so that they can simply use their Apple iPhones and don’t need to have the physical card to make a purchase. “It’s all about ease of use: a lot of our travellers want the convenience of everything on one device.”

### Greater insight into spending

While automation and convenience have delivered significant productivity and cost efficiency benefits for Study Group, both Shelton and Cenidoza highlight reporting and visibility as the biggest advantage from the company’s use of Concur and American Express.

“We also now have a very clear view on what’s being spent and who is spending, especially those people who are spending outside our preferred suppliers.”

“The American Express @ Work reporting tool is really intuitive and informative,” said Cenidoza, who also points to the benefits of using Concur Business Intelligence to provide business decision-makers with the data they need.

“With the growth that we have experienced in the last two years, our cost centre owners are constantly reviewing their actuals and their budgets. They are really demanding the data – they want it here and now, and Concur is very intuitive in that sense.”



“Concur and American Express have provided us with travel insights, allowing us to revisit our policies and make significant improvements. It’s also really helped with our procurement strategy, so that we can look at our merchant spend and negotiate better deals and rebates with key suppliers, especially hotels and airlines,”

Rita Shelton, Study Group’s Head of Finance Shared Services

Greater reporting capability has also translated into greater compliance with GST and FBT requirements, and more granular cross-charging between cost centres, providing the business with a more accurate reflection of financial performance by individual business units, departments and projects.

### No petty issue

Prior to the implementation of Concur and American Express, a surprising pain point for Study Group was its petty cash process. That pain was magnified due to so many physical locations and the significant number of incidental expenses that are incurred by the nature of the work undertaken by Study Group staff.

At each of Study Group’s locations, to manage cash reimbursements for staff, the campus manager or bursar had to manually enter the details into the ERP system, run a payment file and create a cheque. That cheque then had to be signed by two authorised signatories before being sent to the staff member. Study Group was then exposed to all the problems associated with that process: cheques lost in the mail, signatures not recognised, not to mention the additional inconvenience and delay in repayment for individual users.

Now, users can enter their expenses via Concur for cash reimbursements, with the receipt images captured, which initiates the workflow process, automatically interfacing with the ERP system with the date ready for the next cheque run.

The next step will be for Study Group to link petty cash to card accounts, enabling the Concur system to complete an EFT to that card account so that the campus bursar can then withdraw cash to easily repay out-of-pocket expenses.

### Future Plans

In addition to improving the petty cash process, Study Group is also excited by other potential enhancements to the way it is using both American Express and Concur.

Study Group is undertaking a program to promote Concur’s mobile app and encourage more extensive use. “Concur’s mobile app is amazing, but there needs to be a whole sell-piece around that to get more people on board,” said Shelton.

Currently, reporting and data analytics is only accessible to Study Group’s administrators of the American Express and Concur systems. The plan is to put that reporting capability in the hands of cost centre managers and business unit owners. Study Group sees continuing value being derived by increasing data visibility and transparency in the organisation.

Cenidoza is also looking forward to working with American Express and Concur and “getting rid of paper receipts altogether” using e-receipts. He cites the example of 7-Eleven today. “If I purchase something in a 7-Eleven store, minutes later the receipt is already stored as an image in Concur.”

