

6 Tips for building your Concur business

We put this document together which includes our learnings from our partners on what they need most. It is important to us to help our advisor partners build momentum quickly and show how easy and rewarding this partnership can be. Our programme is unique in that we don't ask our partners to sell our solution for us. All we ask is that our partners understand our proposition, identify relevant customers and help introduce us into the right people.

Read on for 6 tips on how to build your Concur referral business.

1.

Analysis & Planning

Understanding the type of organisations that tend to see the benefit of an automated employee expense solution quicker than others is a good place to start. Although Concur has customers in most industries and sizes of organisations, there are a few key criteria which for businesses which tend to close quicker, allowing you to build momentum for this new programme quicker with your sales team.

Tip:

Read '[Profile of a Typical Concur Customer](#)' and target contacts in your customer base with our [email campaign templates](#).

2.

Get informed

As part of the Advisor Programme, you are not required to sell our solutions, however, do make sure that you (and your teams) know where to get the resources you need. Make it a priority to join a training session on our solutions and a live demo we offer to our partners. You can find all our [resources on our website](#) or a selection picked out in your [Advisor Marketing Portal](#).

Tip:

Sign up for a [free 30-day trial](#) and experiment with our expense solution to get a feel of our interface and what the customer experience will look like. There are videos and pop-ups to guide you along the journey. [Read the 'Test Drive Overview'](#) for more information on the trial and how to best use it.

3.

Build awareness

Establish a presence through PR, web and social media to launch your new referral business with Concur. Leverage Concur's brand online by following us on social media, including Concur on your website ([See: email and web templates](#)) and send out a press release ([See: Tips for writing a press release with Concur](#)). When it comes to online search, please see our [partner guidelines](#). We recommend that you build your online presence before any demand generation marketing activities so that you have somewhere to direct your customers.

Tip:

Read our Concur Brand site to access our brand guide and logos. (www.concurbrand.com Username: Concur; Password: Click.Done)



4.

Get internal buy-in

Communication to your internal team and getting their buy-in on this programme is key to its success. This includes both customer facing teams, and marketing and operational functions([see: launch email template](#)). Include the new partnership as a discussion item in internal meetings to get internal buy-in. These sessions are a good opportunity to bring Concur in to provide a live product demo.

Tip:

Compensate your customer facing teams appropriately on Concur deals. In our most successful partnerships, Concur deals go towards quota retirement.

5.

Build a communications plan

In the beginning, your objective should be to develop your credibility in this employee spend category as well as drive leads and interest for the programme. An example communications plan:

1. Email to introduce partnership. ([see: Email Launch Template](#)).
2. Include in your customer newsletter. ([see: newsletter templates](#))
3. Send out email campaign ([see: email campaign templates](#)).
4. Schedule a webinar – expenses and invoices. ([see: Introduction webinar package](#))

Tip:

We recommend that you schedule at least four different communications to your customers.

6. Build Concur into your marketing plan

We have included a series of [email campaigns](#) which Advisors can utilise to drive interest in Concur. All campaigns include landing page, email copy and a call-to-action/asset. These campaigns will be updated regularly.

Tip:

Be sure to personalise these templates to suit your corporate tone and branding standards.

Get Connected

Make sure you know who to contact at Concur as we are more than happy to help direct you to the right place when we can. Most importantly, use these contacts to give us feedback and let us know if something is missing.

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