

Welcome to the Advisor Programme

Let's get started



Customer Facing Employees: Sales, Consultants, Account Managers

Welcome to Concur!

Your organisation has made the decision to join the [Concur Advisor Programme](#) – Welcome!

This is a quick guide to help you understand our Advisor programme, who Concur is, how to identify a good prospect for Concur, questions to ask, our sales engagement process, pricing and where to find things.

If you have any questions, please contact the UK Advisor team whose details you can find on the last tab – Resources. We are really excited to have you on board, and look forward to working with you moving forward.



Regards,

David Vine
Managing Director, UK SMB



**CONCUR
PLATINUM
ADVISOR**

About the programme

Why Concur

Identifying Prospects

Our Sales Process

Pricing

Resources

About the Programme

Our Advisor programme has been designed to be simple.

You provide us with expense referrals from your customers and prospects that you are speaking with, and we provide you with a [percentage of the total revenue](#) of each deal as well as provide an [exclusive discount](#) for your clients to our products!

We give you the choice in how you want to deal with us. Your prospects and clients are precious to you, so you are more than welcome to stay involved throughout the sales process or leave them in our capable hands after you have made the introduction.

What's included:

- **Training:** Why expenses automation matters, our process and product.
- **Marketing support:** co-branded campaigns/collateral, email templates and events/webinars
- **Content:** thought leadership, whitepapers, brochures, research and more.
- **Regular incentives**

Remember, don't be shy. Georgie, our Advisor Sales rep is one of our best at uncovering potential opportunities by typing expenses to broader business challenges – in fact, she was one of our top performing sales reps in previous years. Get her in front of your customer or prospect and watch her work her magic!

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Key benefits of Concur



Visibility

Get real time insight into the current state of business – reduce fraud, improve supplier negotiations and make smarter decisions to control costs. At the same time, improve compliance to corporate T&E policies.



Cost savings

Reduce processing costs as much as 83% while also diminishing errors and expenses claim delinquencies.



Employee Satisfaction

Pay your employees up to 47% faster by decreasing your processing time as well as increased flexibility by allowing employees to submit and approve expenses as they occur.



Concur is a leading provider of integrated travel and expense management solutions. Our adaptable cloud-based and mobile solutions help companies and their employees control costs and save time. Concur's systems adapt to individual employee preferences and scale to meet the needs of companies from small to large.

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Identifying Prospects

There are 4 main things to look out for when you are trying to identify suitable customers or prospects that would be suitable for a Concur solution.

- 1 Manual Expense Process:** this means they are using either excel or paper-based processes. We are looking for a volume of 15+ expense claims a month.
- 2 Local or International Travel:** companies with employees that are regularly travelling whether locally or internationally. Companies with large sales or field teams such as consultants are also usually a good fit.
- 3 2-tiered ERP Systems:** companies that have a 2-tiered ERP system and organisations with multiple branches – either locally or globally.
- 4 Growing companies:** organisations which have growth as a key business objective or have shown high growth in past years are always looking at ways to improve productivity and cut costs.

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Log a lead

1. Send an email to ukadvisor@concur.com or georgie.lynch@concur.com
2. Fill in the online form: <http://info.concur.com/forms/AdvisorReferral>



Account Call (Concur + Referring Rep)

1. Qualify the lead
2. Discuss engagement strategy



Discovery Call (Concur + Customer)

Referring rep is optional participant.



Meeting/Demo (Concur + Customer)

Referring rep is optional participant.



Contracts (Concur + Customer)



Implementation



Our promise to you:

We promise to consult with you on how you would like us to manage the sales process with your customer. To work with you in the deal and ensure constant communication (when the client signs, when the project goes live and any problems, concerns, issues and of course, good news!

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*average based on our MM deals (100 – 499 employee range)

Pricing

of expense claims monthly



Uplifts & extras



Deal sizes ranging from £3 – 150k

Basic implementation and mobile included in pricing as standard



Included in pricing:

- Online expense submission
- Concur mobile app – Android, windows, iOS
- 80 standard reports
- Standard integration & implementation services
- Customer support
- Account Management



Excluded in pricing: (uplifts)

- Customised reporting
- *Extended services:* Help desk, service administration, web services
- *Add-on products:* Expense pay, invoice, audit, Expenselt, Concur Travel, Triplink

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Helpful Resources

Key website links:



Customer testimonials:

<https://www.concur.co.uk/casestudy>



Resource Centre:

<https://www.concur.co.uk/resource-center>



Blog:

<https://www.concur.co.uk/blog>

Follow us on social media:



<https://twitter.com/concur>



<https://www.facebook.com/concur>



<https://www.linkedin.com/groups/concur-149969>



<http://www.youtube.com/user/ConcurTechnologies>

Test Drive:



Try out our solution:

<https://www.concur.co.uk/freetrial>

Concur Contacts:



Sales:

Georgie.lynch@concur.com



Programme:

Jonathan.beacher@concur.com



Marketing:

Rachel.vandermerwe@concur.com

Advisor Toolkit:



Partner Enablement

<https://info.concur.com/content/UKAdvisor>

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Concur, a part of SAP, is the leading provider of spend management solutions and services in the world, helping companies of all sizes transform the way they manage spend so they can focus on what matters most. Through Concur's open platform, the entire travel and expense ecosystem of customers, suppliers, and developers can access and extend Concur's T&E cloud. Concur's systems adapt to individual employee preferences and scale to meet the needs of companies from small to large. Learn more at www.concur.co.uk.