FREQUENTLY ASKED QUESTIONS:

1. Advisor Programme:

What's in it for me?

This is a great opportunity for you to offer your customers additional value by helping them automate their expenses process. For all closed deals, your organisation will get a percentage of the total value of the deal for the life of the client. All you need to do is pass a qualified referral to Concur who will then do all the selling.

In addition, because your organisation is a member of the Advisor Programme, all your clients will automatically get a 10% discount on their Concur products.

Who is Concur?

Concur is a global leader in travel and expense management, with more than 25,000 customers in 100+ countries - streamlining the business travel experience from booking and managing travel, claiming, analysing, reimbursing and approving expenses. Find out more at www.concur.co.uk

2. Sales Process

What is a qualified lead?

A qualified lead is someone (Finance influencer or decision maker) who has agreed to speak with Concur regarding expenses automation and has at least 10 monthly expense reports. We typically find that people who fit one or a few of the below points are usually open to looking at automation.

- Frequent business travel – local or international
- Using other automated systems such as accounting, ERP, CRM, but no expenses module
- Currently has a manual expenses process (paper based or on a spreadsheet)
- High growth (past, continued or projected)
- Multiple locations – either internationally or locally
- Workforce includes field workers or contract workers – sales, engineers, consultants etc.
- Audit by HMRC – has had one in the past, or about to go through one.

What is the process for passing leads?

Passing the lead is easy – simply fill out the form: http://info.concur.com/forms/AdvisorReferral Once we have collected the information, all opportunities will be tagged as an 'Advisor' lead and will credit you. This allows us to reward you once the deal has closed.

Who is the main contact point that Concur wants to speak with? (i.e. role within business)

Concur typically speaks and sells to the finance function – Finance Director or Controller. There are opportunities where IT, Travel and the AP team get involved, but that is likely during the deal. The initial conversations are usually within the Finance function.

Who do I speak to at Concur?

Your contact point is Georgie Lynch.

Phone number: +44 7772 573 952
Email: Georgie.lynch@concur.com

CONCUR PLATINUM ADVISOR

When can I start selling it?

We do not require you to sell Concur. All you need to do is generate interest from your customers, let us know, and we will do the heavy lifting. You can be as involved as you would like – just let your Advisor Sales Representative (Georgie) know.

Can we include Concur in an RFP?

Yes, as long as your customer/prospect understands that their contract with Concur is directly with Concur (i.e. they will be billed by Concur rather than your organisation). We are more than happy to provide you with information and help on your RFP where Concur is involved.

How much will this cost my customers?

It depends on the complexity of the set-up and requirements of the customer as well as the volume of expense claims that they process each month. Our pricing model is based on a 'per transaction' model (or per expense claim) rather than a per user model. That means that the client is able to provide access to all employees and only getting charged for those employees who use the solution.

As a general guide, our standard expense configuration will cost approximately £4 – £8 per transaction. There is no set up fee.

Notes:

* Concur has a minimum contract term of 90 days.
* This pricing is a guideline only- please contact Concur for pricing of individual customers

What is your average deal size?

Our average deal size will depend on the size of business, and the volume of monthly expense claims that an organisation has. On average, with our small to mid-size businesses, the average deal size is between £1800 (1-49 employees) to £9000 (50 – 499 employees). For our enterprise customers, the average deal size is around £50,000 (500+ employees).

What is your close rate?

Our close rate for our mid-market and small business is 25% from when we have our initial conversation (10% opportunity). Once we have determined that there is a project (50% opportunity), our close rate is around 60%. We find that if we work with Advisors, our close rate doubles to 50% from our initial conversation (10% opportunity).

Do you have a 'Return on Investment' calculator?

We do not have a return on investment calculator. The reason for this is that there are a lot of hidden costs that a business may not realise they have from a manual process. These are difficult to calculate without a prior conversation and understanding of how automation will alleviate these pains.

How long does it take for Concur to close a deal?

On average, our mid-market deals will close within 49 days once a project has been identified. With an Advisor, this is typically much quicker as there is already a relationship established.

What does the sales process look like?

Each sales process will vary dependent on how you want us to work with your client. We promise to consult with you on how we manage the sales process before engaging with your customer and will ensure that you know when the client signs, when the project goes live and of course any problems, concerns and issues. Typically though, our process looks like this.

LEAD SUBMISSION: Advisor to pass through a referral. → ACCOUNT CALL: Concur & Advisor to speak and understand the opportunity at hand. → DISCOVERY CALL: Concur to conduct initial conversation with customer to qualify → MEETING/DEMO: Concur to meet with Customer and provide demonstration if required. → CONTRACTS: Concur to draw up contracts → IMPLEMENTATION: Once customer has signed, they are queued in for implementation.

3. Product & Functionality

What are the benefits to an automated process?

There are many benefits of an automated process. The main benefits are:

(a) Cost savings – including processing costs and VAT reclaim
(b) Improved visibility of spend
(c) Increased employee satisfaction
(d) Time savings
(e) Reduce the risk of fraud and non-compliance to HMRC and company policy

What products does Concur offer?

Concur offers a full suite of Saas products - including Expense, Travel, Invoice and Audit. Below is a chart detailing our core products, though we also do have many extended services and offerings available to suit a variety of customer needs. Should you have any questions, please speak with your Advisor Sales Representative, Georgie Lynch.

Product	Product Description	Find out more
Expense	Concur Expense allows organisations to automate their expense process – reducing the time spent on paperwork and processing, while providing improved control and visibility on spend. Expenses can be done anytime, anywhere.	https://www.concur.co.uk/expense-management
ExpensIt	ExpenseIt is an add-on feature to Concur Expense which instantly turns receipt images into expense line items from your mobile. Simply review, edit if needed, and hit export to add it to your expense report.	http://expenseit.com/
Travel	Concur Travel provides corporations with an easy tool to book travel for employees, and also improved visibility into spend and whereabouts of employees.	https://www.concur.co.uk/travel-booking
Triplink	Concur TripLink captures data from flights, hotels and ground transportation – no matter where travel is booked.	https://www.concur.com/en-us/triplink
Invoice	Concur Invoice enables automation of the supplier invoice process, allowing easy processing and quick payment of invoices. Suppliers will also benefit from being able to track progress of their invoices reducing calls to your finance team to chase payment status.	https://www.concur.co.uk/invoice-management
Audit	Concur Audit Services is an objective third party that verifies employee expense receipts without bias, providing control to ensure compliance.	https://www.concur.co.uk/expense-audit

What happens when my client needs help with their system?

Although you will not have access to your customers' Concur instance, there are a few options that a customer can utilise when they have any issues or questions:

(a) Concur Helpdesk - 01753 501 777
(b) Concur Administrator – many companies will have a dedicated in-house resource as their Concur Administrator who can log tickets and answer questions regarding Concur.
(c) Concur User Support Desk – this is an additional functionality that Concur offers which provides support 24/7.

Are there any associated costs in association with implementation of Concur?

This depends on the Concur service(s) that a customer needs for their business. Should there be more complex configurations, a set-up charge will be associated, but for most of our standard implementations, there is no set-up fee. If you have a customer that requires pricing, please reach out to Georgie.

What is the average implementation time of Concur?

This will depend on the complexity of each client's requirements, the services they have requested, as well as their internal readiness to implement. Concur can be implemented in days, hours, or weeks, largely depending on a client's needs and responsiveness.

Are there any pre-requisites that a customer needs to fulfil before being a Concur customer?

No. Concur supports businesses of all sizes and industries. At the moment, we do not have functionality for single users, however.

What are some potential issues that could happen to a client during implementation?

Our implementation team is highly qualified to deal with most issues. The most common which may cause delay to an implementation are usually when a client does not have all the relevant information collected, or when they do not have a dedicated resource to manage the implementation process.

How do you integrate to other finance systems?

Yes. We integrate with all different types of finance and ERP systems. There are a few ways in which clients are able to do this, from simple extract files to financial connector platforms. Should you customer have this requirement, please touch base with Georgie and she can walk you through the options.

4. Resources:

What can I find out more about Concur?

We have a wealth of information on our website. https://www.concur.co.uk/resource-center
There are also heaps of case studies where you can read and see how our clients have benefited. Find out more here - https://www.concur.co.uk/casestudy

What other additional resources can you provide me?

We have a lot of materials and resources available to you including sales enablement pieces. These should all be passed through to your organisation sponsor. Should you require something specific, please reach out to Georgie Lynch or Rachel van der Merwe – Sr. Channel Marketing Manager who will be able to guide you further. Email: rachel.vandermerwe@concur.com