TCG CONSULTING

*Transforming Corporate Travel, Meetings,
Payment & Expense Management*

Assessment of 2018 SAP Concur Fusion Conference – Seattle, WA

TCG's Senior Director of Payment, Expense and Invoice Management and recognized industry subject matter expert attended this recent event and provided the following insights and analyses:

Jim Coufal

What were the key trends that evolved at the event – SAP/Concur driven, supplier positions, and end user needs?

Concur is "settling in" as part of SAP's Cloud Portfolio

- As the clear market leader, the event continues to grow in all areas - number of attendees, suppliers, partners, breadth of client base attending, etc.
- SAP Concur has considerably more of the "look and feel" of SAP than in years prior
- There was a much greater formality around upcoming product changes and innovation – incorporating traditional SAP guidelines – including mitigating commitment and timeline expectations when addressing customer questions like, "When will we see this change?
- There was an increased focus on small-to-medium sized business solutions as Concur reaches the saturation point in the large cap market

What were items of note from a technology and reporting perspective that organizations should incorporate into their long-term plans?

- Management Reporting Platform & Analytics
  - Concur is moving the Business Intelligence management reporting platform off Cognos and onto the SAP Hana database
    - Benefits (Concur communicated) will include easier to use tables, better data relationships, and more intuitive report writing and query capabilities
    - A better connection between travel and expense reporting is also an anticipated benefit
- Next Generation User Interface
  - Concur is releasing an update to their current user interface called Next Generation
  - Next Generation is currently in pre-release mode for early adopters
  - All Concur customers will be required to migrate to the new interface by the end of Q1 2019. Organizations should be fully aware and have operational transition plans in place.

- Customer feedback was very mixed. TCG will be closely overseeing this transition and helping many clients manage this change as part of their broader program strategy and roadmap.

As organizations look to "what's next" for their broader programs, including integrated Travel-Meetings-Payment-Expense, which captures and manages total program costs (TCO), what innovation trends did you see from Concur's perspective to deliver on organization needs and plans?

- Driving policy and audit (fraud) + Artificial Intelligence (AI)
    - Concur's strategic integration with Oversight that mines expense reporting entries for fraud anomalies and AppZen which reads every line on expense receipts and validates the authenticity via social and other channels
- Credit Card Integration (AmEx real time beta)
    - Concur is beta testing real-time API credit card transaction updates with AmEx
    - Other issuing banks and Visa/Mastercard will likely be part of Phase 2
    - POS authorization swipes and the invoiced transaction will display in Concur in real-time
- Real-time integration with ERPs
    - Additional API connectors, cloud-to-cloud integration is expanding to other ERPs such as QuickBooks, JDE, Microsoft Dynamics, Oracle EBS and NetSuite
    - Expanded capabilities have been added to the initial SAP real-time integration

Any final thoughts or insights?

Expense platforms are an integral part of an integrated and optimized Travel, Meetings, Payment & Expense Program for an organization which captures and manages total program spend instead of supplier or category centric (Agency, Card, etc.) strategies; Concur's focus on broader end-to-end integration is a strong signal that this trend is still in its early stages of delivering significant value for organizations via improved oversight, incremental cost take out, enhanced and streamlined workflows and reduced organizational risk.