

USE CASE: MODERNIZING A GLOBAL TECH COMPANY'S TRAVEL & EXPENSE PROGRAM

How Lyndon Group transformed a complex global T&E environment by standardizing policy, streamlining operations, and strengthening compliance and spend visibility.



CHALLENGES

As the organization expanded globally, its Travel & Expense program struggled to keep pace. A single, outdated SAP Concur configuration supported travelers across multiple regions, while policies, workflows, and controls varied widely by country and use case. These inconsistencies created friction for employees, increased audit and compliance risk, and added unnecessary complexity for approvers and the back office. As manual processes and fragmented configurations grew, visibility into spend, policy adherence, and card activity declined—impacting data quality, operational efficiency, and the overall traveler experience.

EMPLOYEE EXPERIENCE & TRAVEL GAPS

- Policies are difficult to navigate and lack consistent, “Concur-aligned” language.
- Limited guidance for international, regional, and statutory requirements.
- Receipt expectations are unclear or duplicated across policy areas.
- Policy and group assignments vary by country, creating confusion.
- Missing APAC travel policy; no unified vendor strategy or safety-based exclusions.

COMPLIANCE, AUDIT, & CONTROL GAPS

- Group structure is overly complex and not aligned to country design.
- Receipt handling rules are overlapping, inconsistent, and hard to interpret.
- Seven expense forms exist where four would suffice.
- Excessive expense types (105), with many rarely used.
- Outdated lists, inconsistent hierarchy structures, and fragmented workflows.
- Heavy reliance on manual updates for employee data and approvals.

UNDERUTILIZATION OF CONCUR CAPABILITIES

- Overlapping audit rules create false triggers and inconsistent outcomes.
- No hard stops for key requirements (e.g., commute mileage, high-risk items).
- Missing or insufficient audit rules for high-risk spend categories.
- Detect configuration does not fully align with written policy standards.
- Role-based access issues, including SOD conflicts and no pre-payment review.

CLIENT OVERVIEW

A global technology organization with business travelers across the U.S., EMEA, APAC, and LATAM engaged Lyndon Group (LG) to conduct a full Travel & Expense (T&E) assessment. The company had grown rapidly and was relying on a single global SAP Concur configuration for Travel and Expense—yet policy, workflow, and system elements had not kept pace with business expansion.

PRIMARY GOALS

- Modernize and globalize the Travel & Expense policy
- Improve employee experience across multiple regions
- Reduce operational workload on the back office
- Strengthen compliance, controls, and audit posture
- Standardize system design across Concur Travel + Expense
- Align global T&E processes with current business need

THE LG ENGAGEMENT

LG executed a holistic assessment across:

- Global T&E Policy & Duty of Care
- Concur Travel (policies, rule classes, vendor strategy, unused tickets)
- Concur Expense (policies, forms, fields, lists, workflows, VAT)
- Audit rules, Detect configuration, & compliance model
- User roles & SOD analysis
- Mobile usage & training program evaluation
- Reporting needs & dashboard design
- Back-office processes and coding corrections

WHAT LG DISCOVERED

1. Opportunity to modernize and globalize the T&E policy

- 60% of best-practice content existed—40% needed rework or expansion
- Needed a comprehensive, structured layout with globalized language
- Required specific addenda for international markets
- Needed an executive-level policy with clear exceptions

2. Significant Travel configuration enhancements

- Need for a dedicated APAC travel policy
- Opportunities to introduce preferred vendor hierarchy
- Improvements to policy violation reasons and system messaging
- Better TripLink adoption to support global out-of-system bookings

3. Expense configuration ripe for simplification

- Clean and consistent forms, but too many of them
- Opportunities to consolidate expense types and align to GL
- Need to remove unnecessary fields and rely more on allocation logic
- Overhaul of receipt handling rules to align with policy + best practices

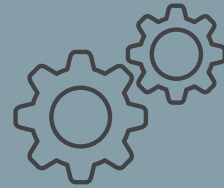
4. Audit & compliance uplift opportunities

- Restructure audit rules by severity + global vs. country exceptions
- Hard-stop rules for high-risk items (airfare receipts, commute mileage)
- Improved alignment between Detect and policy expectations
- Introduce pre-payment exception-based review

RESULTS & IMPACT



**Stronger global compliance
& audit control**



**Simpler operations, less
back-office effort**



**Cleaner data and fewer ERP
errors**



**Better traveler experience,
faster approvals**



**Clear visibility into spend,
risk, and vendors**