

# CASE STUDY



## INTEGRATED EXPENSING, INVOICING, AND PAYMENTS SOLUTION HELPED THIS ORGANIZATION LEAD BY EXAMPLE WITH ADDED REVENUE AND WORKFLOW EFFICIENCIES

### BACKGROUND

Founded in 1903, the Illinois CPA Society is a membership association comprised of over 24,000 CPA professionals representing the entire state of Illinois. Their members hold positions that include CFOs, Treasurers, and individual consultants working at accounting firms and financial institutions across real estate, insurance, and manufacturing industries.

Before implementing the Concur and CSI solution, it took three to four hours and four to five people to approve invoices, cut checks, and obtain check signatures.

They were using SAP Concur for their expenses and had successfully automated the expense reimbursement process. It seemed logical to take a look at how automation of the invoicing side could further enhance their workflow.

### SOLUTION

The Illinois CPA Society started looking at all the preferred partners of SAP Concur. What really stuck out to them with CSI was the all-in-one solution capabilities, meaning that CSI was able to handle not only the virtual card payments but also checks and ACH payments. Some vendors still dictate how they want to receive payment and the Illinois CPA Society was able to automate the process while still delivering their preferred payment method.

With Concur and CSI, both expensing and invoicing could now be managed from one platform providing incredible convenience. Users were able to have a single sign-in for their expense reimbursements as well as their invoices and they were able to do all of their approvals instantly and from anywhere. Suddenly it didn't matter if they were in the office or working remotely. Invoices could be approved and sent in real-time directly from the system.

The CSI implementation process was very smooth. It took about a week total and caused no disruptions to the regular day-to-day workflows. The customer support and vendor enablement were also seamless from the beginning. With a dedicated account manager, any questions or issues could be handled directly by someone familiar with the company and its customized solution.

*"One of the things we like best about CSI is that we have a dedicated account manager. Every time we email him, he emails us right back. He's constantly asking us how we enjoy the platform. He takes our suggestions seriously and works with us to ensure the best experience possible."*

– Ryan Murnick, Controller

### RESULTS

#### Time Savings

It now takes significantly less time and requires half the number of people from invoice to payment.

#### Vendor Enrollment

When new vendors are identified they are typically enrolled on the system by the end of the day. Within the first week CSI had far exceeded vendor enrollment goals.

#### Added Revenue

After six months using the solution, revenue has actually grown as a result of the virtual card rebate received each month.

*"A lot of companies fear breaking away from a process that think already works. Well, we broke a process that worked and replaced it with something that works even better and has created a significant shift in our overall efficiency. I would tell any CPA firm or organization, to take the leap with SAP Concur Invoice as well as the CSI Payscale platform. For a minimal investment of time up front, you will get a huge amount of time savings and cost savings going forward."*

– Ryan Murnick, Controller