

7 STEPS TO PLANNING FOR CHANGE

A guide to preparing for a new
SAP Concur User Interface

Change management is a critical component of running a successful organization, and when that organization is global, managing change presents a constant and unique set of challenges.

As you know, SAP Concur is rolling out our next-generation user interface for Concur Expense. This is the continued evolution of the SAP Concur UI, and for you, the concise, new dashboard design will mean a modern, intuitive and streamlined experience when creating and submitting expense reports.

You can expect full functionality with General Availability (GA) later in 2018. After that you'll have six full months to make the move.

In the meantime, use the best practices outlined in this paper to help you prepare.

- These tips are informed by SAP Concur Implementation experts and based on best practices from other global clients.
- While every company has unique needs, the insight shared here can reinforce your plans and give you new ideas to consider.
- While this paper is focused on the upcoming SAP Concur UI change, the principles apply to a variety of global process, technology and other changes you may one day need to manage.



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Good communication with the people impacted by change is the key to effective change. Your impact analysis will tell you what you need to tell your people, and it will lay the groundwork for training them for the UI rollout in the most efficient way possible.

Assess the impact.

With any change, global companies have complex factors to consider, including the overall reach of your business, the intricacies of your configuration and the number of users.

If you want the most effective plan, you'll need to:

- Identify what the changes are; how they impact your expense process; what regions, countries and employee groups they affect; and how they are affected.
- Detail all of the changes that will occur between your current state and future state and outline strategies for addressing them.

As other global organizations have discovered, this impact analysis helps determine the size and scale of the change. A successful analysis also:

- Provides the foundation for your communication and training approach.
- Defines your constituents.
- Identifies decision makers, as well as those who need to be aligned and informed regarding decisions.

[Use this simple tool](#) to make sure you're asking the right questions and capturing the right information.

Pull the team together.

Once you've identified your stakeholders, convene regularly with tactical IT team members, your global training team, communication leaders, the helpdesk, your technical team, auditors and executives.

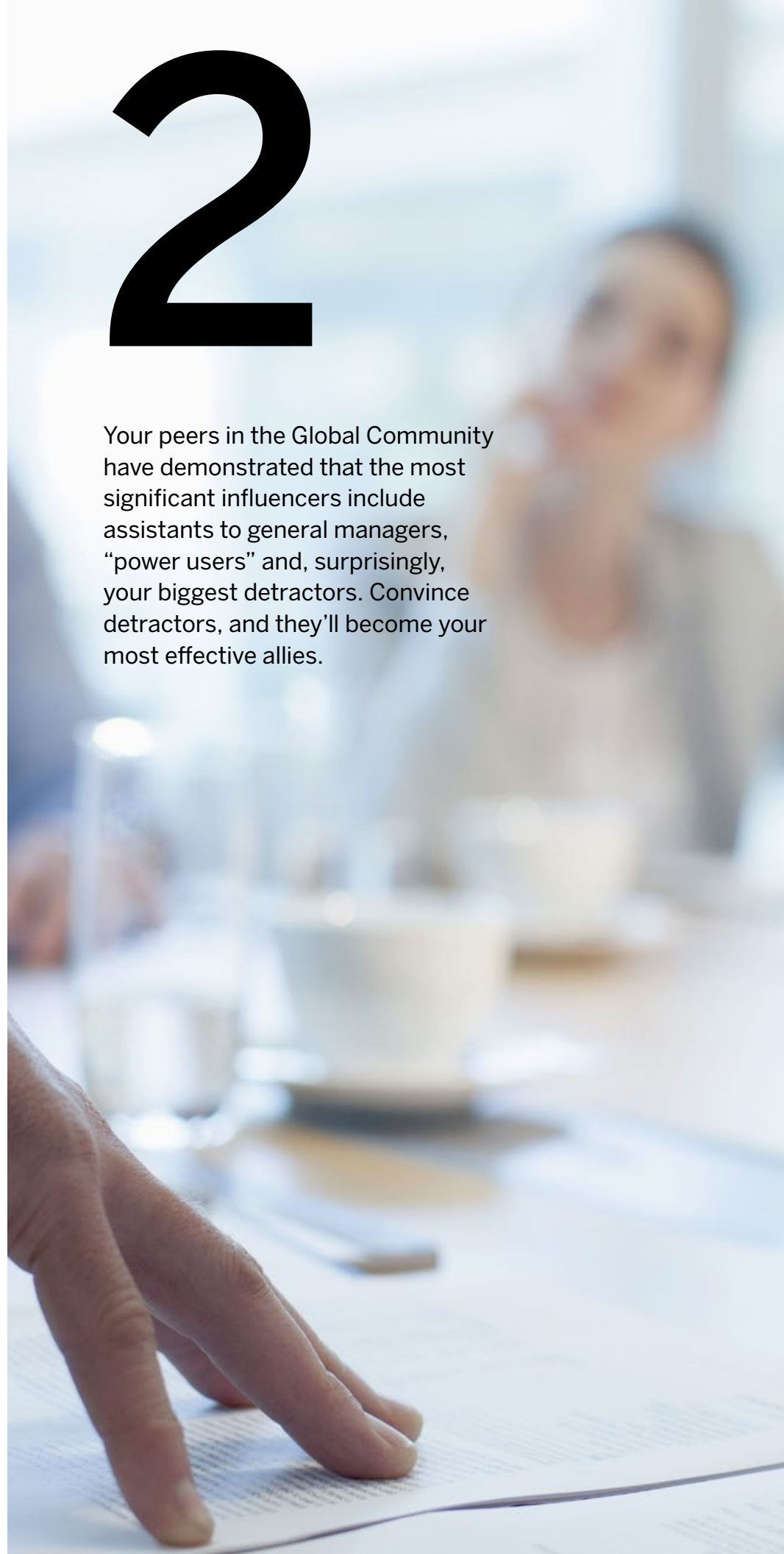
With your team in place, you'll want to agree to the approach that will guide you. Once you've got principles in place to guide the change effort, you'll be able to align them with your corporate culture, lessons learned from past change events, and the scope of change for end users.

To align on these principles, consider:

- **Communication:** Set the cadence of your communication—either frequent messages over a longer period, or a few detailed messages closer to the launch. Global clients have seen success creating separate communication streams for executives and their assistants.
- **Rollout:** Do you plan to rollout all at once or in increments? Some global clients have found that grouping countries with similar characteristics, challenges or regulatory issues is effective when planning waves of a rollout.
- **Geographic Approach:** Consider the scope—will it be global, regional or country-specific?
- **Training:** Will training be mandatory or optional? Will it be self-paced or instructor-led? Do you have the resources to support training in all the countries or regions where you need it?
- **Context:** Where do you currently sit with T&E? Are you going through any internal process or policy changes that may impact the UI effort? If so, can the two change events be coordinated?

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Your peers in the Global Community have demonstrated that the most significant influencers include assistants to general managers, “power users” and, surprisingly, your biggest detractors. Convince detractors, and they'll become your most effective allies.





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Phase the rollout with clear, specific timelines.

While it might shorten the period of change, a single rollout all at once is often too much change for an organization of your size to undergo.

Instead, many global clients recommend a phased rollout, beginning with their internal thought leaders (typically, assistants to senior leaders). Starting with these key influencers—and using them as a “pilot” group—will allow you to gather information that can guide and improve the rest of your rollout.

This test team will identify issues and can become your best source of information on what to do first, what to do next and what to avoid altogether. With their input, you’ll learn which materials, training and communication tools will be required for the broader launch.

Global clients have had success running one, small, thought-leader pilot, consolidating feedback, and running a second, small pilot with power users to confirm the improvements.

Taking the time to do a second test helps identify issues early, before they impact the rollout.

Be clear about the phases of the timeline, so people understand and feel comfortable with:

- When the project begins.
- The overall timeline for transition.
- Key milestones.
- Rollout waves (which teams/countries/regions are planned for which particular time periods).

Considering the complex nature of a company of your scale, we recommend starting the process before General Availability, then building a three- to six-month schedule based on your unique situation. This will give you enough time to prepare and roll out the UI change.

See the back of this report for a summary and sample schedule to help you kick off your planning.

Start training early.

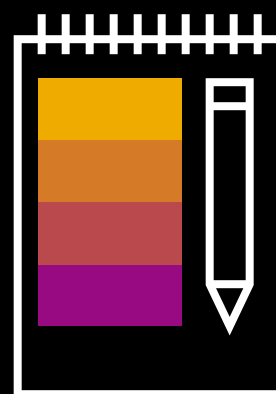
Your pilot groups are a great source for your training content. They'll have questions and concerns, and those issues will form the basis for your training.

It's also important to plan for pre-, during- and post-deployment training. Some of our most successful global clients take a proactive approach to gathering user feedback and using it to facilitate continuous improvement before, during and after a change.

For organizations of your size and global reach, it might take extra time to update your training materials. Don't underestimate this task. Consider the following:

- ☐ How much documentation is unique to your company?
- ☐ Do you need to re-record audio/video training?
- ☐ Do you have the screenshots you need? Do they differ by country?
- ☐ Do you have time built in to translate training materials into multiple languages?
- ☐ Are you working with your in-market teams to create training plans and content? Are there nuances that affect each market? If so, you'll want to work with local training teams to address those unique issues.
- ☐ Are you prepared to evaluate and adapt training on-the-go, based on the feedback you get?
- ☐ Have you enabled your global helpdesk to handle an uptick in questions?
- ☐ Do you need to allocate budget for training updates and expenses?

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Think about how your audience(s) likes to consume information.

Many of our global clients have seen success by considering different audience demographics. For example:

- **Format:** PDFs may be most helpful for some workers, while videos may be best for other digitally-savvy employees. Ensure you have mobile-friendly training for people on the go.
- **Forums:** Interactive feedback forums allow the most vocal and engaged users to provide input, suggest changes and get updates.
- **Social:** A live Community "Hub" offers users a place to get frequent updates and information.
- **Executive Connection:** Offer visibility to executive stakeholders, so it's easy for them to stay involved.

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Communicate often.

Evaluate your communications channels based on your company's culture. Be sure to use multiple channels to deliver the message, including:

- A series of email updates and messages from executives.
- Internal employee portals or newsletters.
- A dedicated, frequently updated website with detailed rollout information.
- Pre-, during- and post-change webinars, tailored for your unique audiences.

When communicating with each audience, be as specific as possible to their needs. For example, IT will be focused on different aspects than the sales team.

Another tip from our global clients: be sure to highlight the positives—but be realistic and specific about what to expect and when. Your teams will appreciate the transparency and straightforward communications.

Shared success.

One global company used technology and employee feedback to manage change by:

- Embracing a social support model, giving users a venue to connect, learn on their terms and share valuable feedback.
- Using shared information to pinpoint and immediately address questions—then training accordingly, making it as relevant as possible for the user.
- Creating custom and engaging videos around focused topics, rather than longer, multiple-topic videos that cover too much detail.
- Developing a chat bot to quickly answer users' questions and identify topics to focus on in training.

Measure satisfaction.

Use surveys before and after training rollout to gauge progress and/or success. You can use surveys to discover any gaps in communication, determine which topics need more focus, and assess your tools. By asking the right questions, you'll be able to evaluate the effectiveness of end-user training.

You'll also want to identify what success will look like. What targets do you need to hit? What metrics will you be measured against? Some sample metrics include:

- Percentage of employee adoption.
- Time needed to complete the travel and expense process (by users and/or back-office staff).
- Number of times users needed help from back-office staff.
- How end users are adapting to change.

Measure and compare these metrics before the change, and again one to three months after implementation to gauge your progress.

Like the other recommendations in this paper, satisfaction surveys are effective beyond the UI change. If there are other tips, best practices or training opportunities related to your technology, travel policies, expense processes, examine them as well, and ensure your training and communication materials are effective across the board.

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Make sure your staff is ready to help.

Giving your people resources to turn to is the most helpful thing you can do.

There may be extra questions and an influx of calls as each phase rolls out. So you'll want to be certain your staff is prepared to answer additional inquiries. You'll also want to use the questions you get as fuel for further training.

Our global clients recommend that help-desk, on-site IT and training teams around the world are adequately trained to handle incoming questions.



Get ready for change.

The new user interface for Concur Expense will result in time-savings, an improved experience and a stronger expense management program overall.

SAP Concur is committed to helping:

- We're as invested in the change as you are, and we want to make the transition seamless and successful as possible.
- SAP Concur Service Administrators are trained to help global clients prepare for and manage configuration updates, making sure the technology runs smoothly and is ready for change.
- We have the tools and resources to support you through this transition—from end-user and administration documentation to our [change management toolkit](#).

Remember, change is ongoing, so keep these recommendations, your personal best practices and user feedback—they'll prove invaluable as you steer through future technology changes in your business.

To learn more, or for additional help in preparing for the UI change, please contact your Global Account Director.

SAP Concur resources:



A sample countdown calendar to change.

Change is constant, and that means it takes time. Take a few minutes to examine this sample change management schedule to see how your Global Community peers manage change.



T- 5 Months	Impact Assessment/Analysis	
	<ul style="list-style-type: none"><input type="checkbox"/> Define exactly what is changing.<input type="checkbox"/> Identify the reason(s) for the change.<input type="checkbox"/> Describe the impact it will have on the company.<input type="checkbox"/> Determine the size and scope of the change (including forms, home pages, etc.)	
T- 4 Months	Action Planning	First Pilot
	<ul style="list-style-type: none"><input type="checkbox"/> Plan rollout waves <p>Complete prep work:</p> <ul style="list-style-type: none"><input type="checkbox"/> System updates<input type="checkbox"/> Training materials (point out what's changed, keep it simple)<input type="checkbox"/> Communications plan<input type="checkbox"/> Special communications to exec leadership	<ul style="list-style-type: none"><input type="checkbox"/> Target influencers, exec assistants<input type="checkbox"/> Gather feedback, suggestions, and input<input type="checkbox"/> Adapt training and communications based on feedback
T- 3 Months	Messaging/Communications	Pilot
	<ul style="list-style-type: none"><input type="checkbox"/> Finalize communications<input type="checkbox"/> Use simple messaging outlining impact and benefits; be clear, concise and positive<input type="checkbox"/> Deliver awareness communications ahead of time (three months); and provide one additional update each month prior to launch<input type="checkbox"/> Use multiple channels to deliver communications at each milestone (email, newsletters, portals, webinars, etc.)	<ul style="list-style-type: none"><input type="checkbox"/> Launch second pilot (Ex: in Asia, AMAS, Europe)<input type="checkbox"/> Collect learnings from pilot groups to inform subsequent waves<input type="checkbox"/> Ensure support groups are adequately staffed and prepared with specific information about what to expect, and key topics
T- 1 Month	Pre-deployment	
	<ul style="list-style-type: none"><input type="checkbox"/> Deliver pre-launch communications<input type="checkbox"/> Deliver training webinars	
Launch	Deployment Waves	Post-Deployment
	<ul style="list-style-type: none"><input type="checkbox"/> Typical waves are defined by country, region or by groups (frequent users, sales, etc.)<input type="checkbox"/> Monitor feedback, update content and communications accordingly as you go	<ul style="list-style-type: none"><input type="checkbox"/> Gather feedback and measure user satisfaction via surveys

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