

ACADEMIC TRAVEL ABROAD

SAVES 500 HOURS / YR
WITH SAP CONCUR & RYVIT

CUSTOMER SUCCESS
INTERVIEW

Meredith Akery
Sr. Finance Manager
Academic Travel Abroad



INTRO

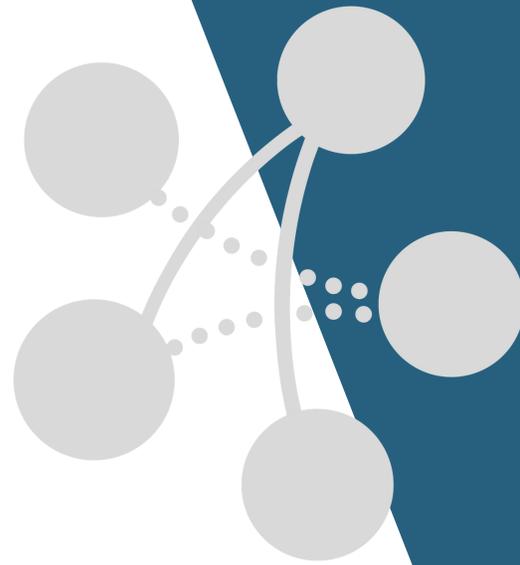
"In these unprecedented times..." is a phrase that's become common nomenclature in 2020, but I'd argue that it's time to stop falling back on the unknown as an excuse and instead lean into it as an opportunity.

And it's in that mindset that I found myself sharing a Zoom call with Meredith Akery, Senior Finance Manager at Academic Travel Abroad (ATA); a leader in educational group travel and study abroad, and a company that brings 70 years' worth of experience to the table when it comes to working through circumstances beyond your control.

VIRTUAL PROGRAMS FOR THE SAVE

"ATA is used to pivoting in the face of crisis." Meredith recalls two semi-recent events (the volcano that erupted in Iceland back in 2010, and the SARS outbreak in 2003) that presented unique challenges and demanded very creative solutions from the team. "During the SARS outbreak, for example, we had a ton of people signed up for our programs in China. When the outbreak closed all international travel to China, we quickly adjusted to a Chinese language immersion program in Washington, D.C."

"IMPLEMENTING CONCUR EXPENSE AND RYVIT COULD NOT HAVE COME AT A BETTER TIME."



While versatility is built into the fabric of ATA's culture, this pandemic emerged rapidly, with little warning, and has carried on much longer than anyone anticipated. As a result, ATA has travelers that are "so stir crazy and itching to go" on their travel programs.

"To the credit of our customer engagement and travel coordination teams, we have travelers that have pre-booked for the next available program because they love what we provide and can't wait to get back out into the world."

To help keep their engagement up, ATA has leveraged virtual events like never before. They now offer programs for Chinese, Japanese, Arabic, and Portuguese languages. *"Our program managers are working as hard as they can to make sure that we continue to meet the needs of our partners."* Sure, virtual isn't the same as an immersive in-person experience, but with tools like Canvas, ATA has been on the forefront of taking the next step forward in delivering multi-cultural experiences. And according to Meredith, these aren't temporary tactics, but have become part of a broader long-term solution set for ATA as they expand their offerings for 2020 and beyond.

BEHIND EVERY GOOD VIRTUAL COMPANY IS A FANTASTIC VIRTUAL EXPENSE PROCESSING SOLUTION

"Implementing **Concur Expense** and **Ryvit** could not have come at a better time." We started the implementation process with Meredith and the ATA team in 2019. At that time, no one knew what was coming in 2020, but regardless of the virtual world we find ourselves forced into today, ATA had already set their sights on getting rid of some outdated processes.

"Since I joined the accounting team in 2011, it was always top-of-mind for us to have our accounting processes moved from paper to digital. We didn't have an online system for approvals and payments, and that was painful because we had to rely on email folders. And as such, items weren't timestamped and consistently fell through the cracks. For a long time, our payments process was simply a cluster of pain points."

SAP Concur brings two very powerful solutions together in one platform - one for expenses and one for invoices. For Meredith and the ATA team, having an all-in-one solution was paramount.

*"Even before the pandemic, ATA has a lot of remote staff. And really, the only thing that was done by paper was cutting checks. Thanks to **Concur Expense**, we've been able to ensure that anyone in the company can open up the system at anytime to process their reports and check the status."*

Meredith vetted several solutions in their search for payment processing automation. Many of those solutions were single-task tools that focused on only invoice processing and lacked purchase order processing capabilities. Since Academic Travel Abroad leverages **Sage 300 Construction & Real Estate** as their accounting solution, finding a robust and flexible expense processing tool like **SAP Concur** was a must. *"I think outsiders would say that **Sage 300 CRE** isn't a great fit for us, since we're not in the construction business, but that's simply not the case. And in fact, before we were looking at **SAP Concur**, we were actually thinking about completely changing our accounting software. But we really need those project-based codes."*

EVERY SAGE 300 CRE CUSTOMER NEEDS TO KNOW ABOUT RYVIT!

*"When **Ryvit** came into the fold, they just understood **Sage 300 CRE** so well that we were actually able to take a step back from the implementation and allow **Ryvit** to drive the project with **SAP Concur** for us. It was a huge benefit to have them involved."*

Not only did **Ryvit** help with the dataflow into **Concur Expense**, but Meredith says that working through this implementation also improved financial processes that aren't directly involved with **SAP Concur**. *"Ryvit helped us understand **Sage 300 CRE** better. Our processes matured in **Sage 300 CRE** because of the feedback and ideas we were getting from **Ryvit** during the **Concur Expense** implementation. They gave us some really good perspective on our setup and helped us optimize the way we were leveraging **Sage 300 CRE**. For us, that kind of data management was revolutionary."*

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LIFE AFTER IMPLEMENTATION IS AWESOME!

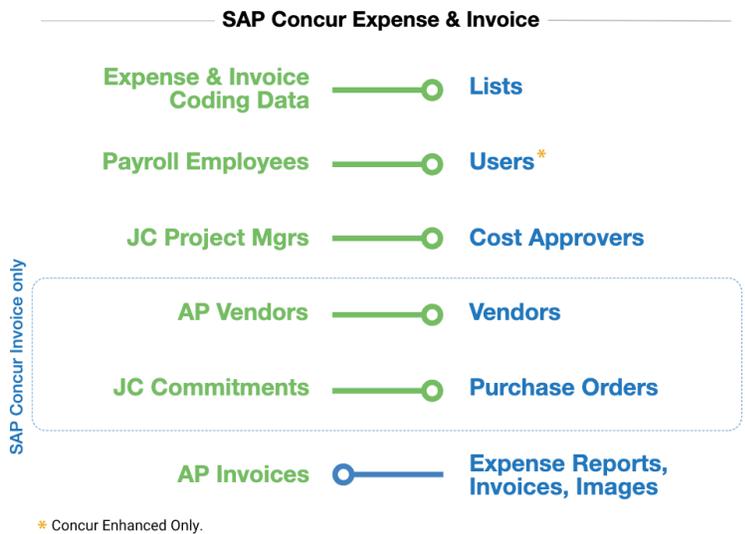
The integration between **SAP Concur** and **Sage 300 CRE** is slick. For ATA, it was revolutionary. It starts by making sure that all active jobs in **Sage 300 CRE** are automatically synced in **Concur Expense** on an hourly basis. *“The fact that our staff can login to **Concur Expense** and see the cost codes is so helpful. It’s not our program managers’ or our reservation specialists’ job to memorize accounting codes. In the past, when it was a free form, people could get creative with their cost codes. And sure, we knew what they meant and could correct the codes before the report was inserted into **Sage 300 CRE**, but having those codes automatically built into the user experience for our field teams has saved us so much time.”*

But it wasn’t just about cost codes. ATA’s processes changed overnight. In fact, their VP of Finance, who had recently become the de facto check delivery driver - thanks to remote work - didn't need to drive to the CEO’s house anymore for signatures. That alone proved the ROI.

*“We haven’t even fully explored every avenue of **SAP Concur’s** offerings. We fully expect to take advantage of the reporting module in the future, and we fully expect the volume to increase over the course of the next year.”*

Unfortunately, ATA did have to undergo a reduction in force in 2020. But Meredith reports that **Ryvit’s integration is saving Academic Travel Abroad about 500 hours per year**, and that it’s helped tremendously, especially since there are fewer people on the team now.

And that’s not even the full extent of the ROI they anticipate in the future. While ATA’s US-based team is leveraging **Concur Expense**, they haven’t fully introduced it to their international offices, yet. When they do, the ROI will take another exponential step forward. *“We absolutely plan to open up this system to our international team members. We get massive expense reports from our study abroad sites, and having those reports submitted through **Concur Expense** would be amazing.”*



“WE FULLY EXPECT THE VOLUME TO INCREASE OVER THE COURSE OF THE NEXT YEAR.”

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"WE'VE ELIMINATED ABOUT 10 HOURS OF MANUAL WORK FROM THIS PROCESS PER WEEK."

ADVICE FOR OTHER ACCOUNTANTS ON SAGE 300 CRE >>

*"Use **Concur Expense** and **Ryvit**. This was such a good solution for us. If you're doing a lot of manual data entry, there is a better way."*

Meredith reports that not only did their "journey" of financial automation solve a lot of problems in the moment, but it's also set the stage for their accounting and finance team to tackle stronger projections and helped them become a more strategic unit for the company at large.

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