



EvaluateServe Improves T&E Compliance with ExpensePath

“ExpensePath has been the ideal solution for us – it took a couple hours to implement, saves time for Finance, is easy for our employees globally, delivers better compliance with rules, and uncovers T&E cost savings.”

- Nand Gangwani, CFO



EVALUESERVE
YOUR GLOBAL KNOWLEDGE PARTNER

Industry

Custom Research & Analytics Services

Employees

2,700 in the US, Europe, Asia, Latin America

Challenges

- Limited time to implement
- Users located globally, often with submitters in a different geo than their reviewers
- Must be easy for employees
- Replace highly manual process

Results

- Implemented in hours
- Employees know and follow rules better
- Finance processing is easier and faster
- Employees find system easy to use and less time consuming
- Better visibility into T&E spend

Background

EvaluateServe provides customized research and analytics services worldwide to leading-edge companies through its 2,700 employees based throughout the US, Europe, Asia, and Latin America. As operations have expanded in complexity and geographically, Finance has led efforts to improve efficiency and reduce costs. This included a complex migration of its accounting system in 2011 and 2012. In 2013, EvaluateServe wanted to replace its manual expense reporting process which consisted of an Excel template, email, and manual auditing by Finance.

Quick & Easy Implementation

There was limited appetite to commit time to deploy a solution according to EvaluateServe CFO Nand Gangwani: “We wanted a solution that would take minimal effort to implement and would not require re-creating our expense process. It took only a couple hours of my team’s time to get ExpensePath setup and minimal time to support employees since it was so easy to use and ExpensePath provided support to directly answer the occasional questions from employees.”

Fast Processing

With ExpensePath, EvaluateServe’s Finance Department has a much easier time processing expense reports even though employees are located all across the globe. According to primary administrator Neha Bhatnagar, “It has improved employees’ ability to follow our rules, made processing faster, and provides the data and backup for storage and easy entry into our financials.”

A few key benefits:

- Automation of previously manual parts of the process: routing expense reports through the approval chain, comparing expenses to company policy, currency conversion for international travel, and calculation of mileage reimbursement.
- More appropriate policies can be set to define limits for types of expenses and can even be differentiated for groups of employees (i.e. Senior European Salespeople).
- Expense items with missing receipts or outside company policy are highlighted to draw reviewers’ attention.

Easy for Employees

The migration to ExpensePath has been virtually seamless for employees who have welcomed the new process. As stated by EvaluateServe Client Executive Marty Perelstein, “ExpensePath is very easy to use, helps me more easily track my expenses and receipts, and takes much less time to create my expense reports.” A few key benefits:

- There was no training required as the system is intuitive to use and comes with direct support to all users.
- EvaluateServe employees previously had to save their receipts and scan them into a PDF file but now employees can store receipt images immediately when incurring an expense with ExpensePath mobile apps or email them into their account.
- With employees in so many countries, a big benefit has been that employees’ expense reports, expenses and policies are in their currency and any necessary exchange rates for foreign travel are auto-calculated.



Expense Management
Automation

info@expensepath.com
www.expensepath.com