



TripActions
SUCCESS STORY



EPICOR

Challenges

- Frustrating, time-consuming booking process
- Antiquated admin and policy tools
- Lack of visibility with corporate expense tool
- Regional implementation

Solutions

- 66% time savings
- Increased user satisfaction
- Improved visibility and control
- End-to-end global solutions

Epicor Harnesses TripActions for Global End-to-End T&E Solution

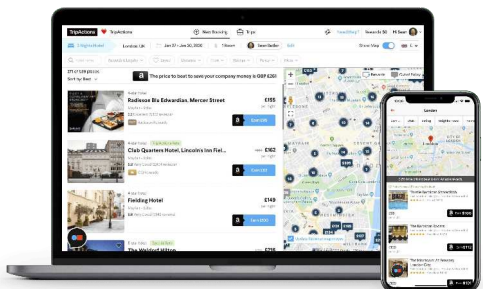
Epicor wasn't looking for a new corporate payment solution, but it became clear that TripActions Liquid™ was the perfect complement to TripActions for an end-to-end corporate travel and expense solution. Since implementation in 2020, Epicor has seen time savings of 66%, user satisfaction skyrocket, and overall improvements in adoption, productivity, and savings.

“It was a no-brainer to make the switch to TripActions Liquid, to have full control and visibility while increasing the convenience to our travelers who use a corporate payment method,” explains Epicor procurement consultant Robin Bell.

A Fast Global Implementation

Austin-based software company Epicor set out to modernize their travel platform during the pandemic as part of their progressive culture shift and found TripActions Liquid to be the perfect complement. Once the decision was made, Epicor's team was blown away by the speed and detail of implementation.

The end-to-end TripActions solution was implemented globally across all Epicor offices in less than 60 days and TripActions Liquid specifically took less than two weeks.



“Once we put boots to the ground, it was two weeks or less from when we started clicking buttons in the system to when we were live and ready to distribute cards,” explains Robin, who calls the implementation a key differentiator. “It was just so easy to translate our written policy into the robust and dynamic TripActions admin side.”

Their previous solution had to be implemented regionally and required key team members to stop their regular work to assist in the training. With TripActions, the global implementation was done at once with a TripActions representative present.

“A huge pro is having a single platform and one access point across our entire global employee base,” says Robin.

The TripActions teams also helped Epicor align around best practices, hosted all of the training, and provided user guides and training videos. Going beyond a static one-hour training video, the TripActions team made easily digested five-minute explainer videos for booking hotels, flights, and cars.

“No matter how our travelers needed to consume that information, whether it was written in a quick user guide, recorded in a short video or a full hour-long live training session, TripActions really enabled us to deliver that to our travelers,” says Robin.

While Epicor is now sailing smoothly with TripActions, the two teams come together in weekly feedback meetings to immediately address any questions or concerns.

“To have that checkpoint on the calendar regularly is really a game changer for us from an ongoing account management standpoint, and really highlights the partnership that we’ve found and not just the provider,” explains Robin.

Adapting Policies in Real Time

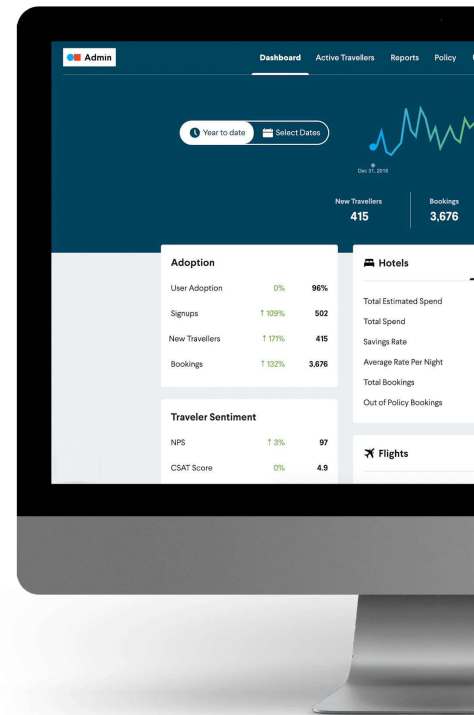
It was important that Epicor find a solution that allowed them to adapt and update policies in real time.

“Having the access to update TripActions Liquid on the fly substantially increases our ability to adapt and make changes, based on the charges we see, the behavior of our travelers, and changes in our policy. We don’t have to spend time and resources making those backend changes in the solution and they’re immediately available on the front end so that our travelers can realize that same level of time savings and ease of use—even in the face of change,” says Robin.

The Epicor finance team feels comfortable distributing TripActions Liquid cards across the company due to visibility and control from proactive real-time policies.

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— Robin Bell
Procurement Consultant,
Epicor Software



“We have full visibility and easy control over every transaction. TripActions Liquid provides the security needed to ensure all charges remain in compliance with policy, and gives us full visibility into all of the spend coming through the system in a categorized and effective way, so that we can manage it without adding headcount.”

Time Savings Skyrocket

The time that Epicor employees spend submitting expenses, booking travel, or managing it all on the backend has decreased significantly.

TripActions Liquid specifically saves 66% of the time previously wasted on manual expense reporting. On the travel side, it takes travelers a third of the time to book than it did with their previous solution. All that time saved is reinvested back into serving Epicor’s customers and revenue-generating activities.

“If you take that and monetize it, depending on whose salary we’re talking about, that’s a huge return,” says Robin. “Instead of sitting in the hallway on hold for 45 minutes to make a change, that time gets reinvested into our key priorities and initiatives.”

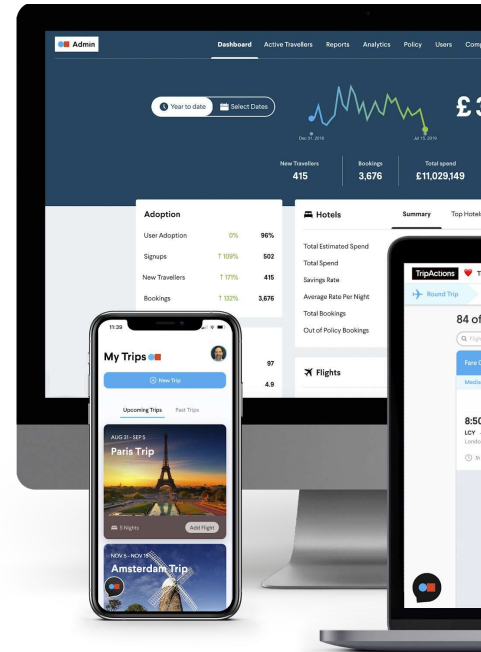
It’s just one of the reasons that the Epicor executive leadership team and their direct reports love TripActions Liquid cards.

“We have had corporate payment solutions available to us in the past, but without the visibility and controls that TripActions Liquid offers, we weren’t able to opt into those solutions. TripActions is the whole package for us,” says Robin.

Across-the-board Satisfaction

The end-to-end TripActions solution has increased adoption rates and productivity while reducing leakage and out-of-policy spend. Plus, travelers and admins remark how the solution is far superior to anything they’ve used before.

“The feedback from historically difficult-to-please end users has been overwhelmingly positive in every aspect of the tool, from signing in to managing loyalty programs, to ease of use in booking. The availability of chat has been huge. Access from mobile has been huge. Being able to fully self-manage reservations, so book and cancel on the platform has been huge,” summarizes Robin.



Fast becoming the default for corporate travel and spend management, TripActions is the leading cloud-based T&E platform that combines industry-first technology with best-in-class travel agency service. Trusted by travel managers and finance teams alike at more than 5,000 companies globally, TripActions leverages real-time data to keep traveling employees safe, control costs, and save time. Learn more at www.tripactions.com. Join the TripActions Community at <https://community.tripactions.com>. #LetsGo