



Customer: City of Georgetown, Texas

Number of Employees: 500+

Country: United States of America

The City of Georgetown was looking for a solution that could streamline their expense management process which was using three disparate systems and leveraged little or no technology.

After a rigorous selection process, they selected SutiExpense, the comprehensive travel and expense management solution from SutiSoft, as it offered greater flexibility and customizability at a very competitive price.

#### The Result?

- Accelerated and streamlined processes
- Real-time visibility
- Policy Adherence

# City of Georgetown Streamlines Its Spend Management Processes Using SutiExpense

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**- Mike Peters, IT Director, City of Georgetown**

The City of Georgetown is a Texas "Home Rule" Charter City, located in the center of the state near Austin. Its 500+ employees serve a population of more than 50,000 residents.

Awarded the DGAA (Digital Government Achievement Award) in 2011, the City's mission is to preserve and enhance the quality of life, and the unique character of Georgetown. It achieves this mission by preserving Georgetown's rich heritage and natural resources; promoting well-planned development, cost-effective professional management, and competent friendly services; and protecting its citizens, the environment, and all other assets.

## The Problem: Inconvenience of Manual Processes

Expense management was a slow and manual task - both for the employees and for the finance department. There were many issues impacting the expense management process. These included the existence of multiple processes and systems, difficulty in monitoring faulty/incorrect claims, employee reimbursement delays, and the inconvenience of traditional paper-based submissions. Even the few employees who leveraged technology for expense reporting used a rudimentary Lotus Notes application.

The prevalence of these issues, plus an executive decision to retire Lotus Notes, prompted the City to look for a new process. Determined to find a solution that would make this long and tedious process easy and manageable, the City formed a selection team to investigate the problem and come up with the right solution.

## Challenge of Using Multiple Systems

The City of Georgetown was using three disparate systems for travel authorization, corporate credit card management, and expense reporting. There was little automation in the process with a major portion of the work being performed using Lotus Notes, which was difficult to use and needed frequent manual intervention. Furthermore, the outdated infrastructure required the use of several distinct servers resulting in storage of data at multiple places. This required manual processes for export and consolidation of data to create unified reports. Receipts were also being submitted and stored in paper form, adding to the manual effort and storage costs.

## Need for a New System

After due deliberation, the team recommended that the City deploy an expense management software to help streamline its travel authorization and expense reporting process. The new software was expected to address the following specific needs:

- Provide seamless credit card integration, allowing for real-time monitoring and eliminating the need for data duplication
- Be the single solution for all their expense reporting needs
- Include travel booking capabilities if the City chose to implement online booking in the future
- Automate the receipt collection and verification process to save time
- Be easy to use and allow for some level of customization
- Allow enforcement of limits and policies
- Prevent faulty/incorrect reporting and bring a high degree of visibility and transparency into the system
- Provide for immediate approval and rejection of reports
- Increase process efficiency resulting in lower costs
- Provide better data insights based on department and expense types
- Provide robust employee training and support
- Offer a mobile app

## Selection Process

To ensure a fair and transparent selection process the City Council issued a Request for Proposal (RFP). Seven companies - including several industry leaders - responded to this RFP.

The different vendor solutions were then evaluated on several parameters including functionality, cost, feature set, customization capabilities, credit card provider integration, mobile capabilities, and flexibility by a selection team. The evaluation team consisted of members from accounting, purchasing, IT, and end users representing different departments. The team set a high value on the solution feature set and overall cost.

As a part of the due diligence, the selection team also met with representatives of several service providers for in-person demos and detailed evaluations.

## Why SutiExpense?

Among the seven vendors that the City evaluated, it found SutiExpense to be the best fit for its needs. While all solutions provided basic expense categories, the SutiExpense solution was the only one that allowed association of the City's General Ledger (GL) codes directly to individual expense items. While comparing SutiExpense with other leading expense management solutions, the City found the solution significantly better on three counts: it offered greater flexibility, it could be customized as per their specific requirements, and the solution was very competitively priced.

The City had a very aggressive implementation timeline but SutiSoft managed to satisfactorily meet all of them. The contract process was also straight-forward with no negotiation roadblocks and all of the City's requirements were met. SutiSoft offered extensive support during the implementation process and imparted training to employees using the system.

## The Result: A Better Spend Management System

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By deploying SutiExpense, the City of Georgetown has been able to combine its three different systems into one. While it is too early to accurately measure the full impact of this deployment, SutiExpense has already streamlined the expense management process and ensured strict adherence to policies.

**Simpler User Experience:** SutiExpense combines the City's different systems into one comprehensive solution. Be it travel authorization, credit card / receipt handling, or expense reporting, users can now perform all these tasks from a single interface.

**Accelerated Processes:** Earlier, when users entered any incorrect information, identifying and correcting it would take a long time. With SutiExpense, all the administrator has to do is reject the report (or a specific line item) and an e-mail is automatically sent to the user. The user can then take immediate corrective action.

**Real-time Visibility:** With SutiExpense, the City can now get real-time data about employees' spending habits. This allows it to take quick and informed decisions.

**Better Policy Adherence:** SutiExpense allows the City to lay down policies, guidelines, and budgets across various departments, making it easier to implement and monitor compliance.

Hence, deployment of SutiExpense helps the City of Georgetown achieve its objective of providing cost-effective professional management and frees up its employees so they can better serve its residents.

## About SutiExpense

SutiExpense is a cloud-based end-to-end solution that automates the process of travel and expense management. It streamlines the processes of corporate travel booking, expense reporting, employee reimbursement, and data integration. The solution has an intuitive and flexible design, supports rapid deployment, and can be easily configured to meet the needs of any business. SutiExpense helps organizations reduce processing costs, control travel expenses, implement budget limits, and drive policy enforcement.

SutiExpense is just one of the many cloud-based business management solutions offered by SutiSoft. The company's other solutions include: HR management, procurement, CRM, document management, data analytics, electronic signature, social collaboration, and password vault. Headquartered in Los Altos, California, SutiSoft also has regional offices in Germany, India, and Japan. Additional information is available at [www.sutisoft.com](http://www.sutisoft.com).

**For more information, visit us at :**

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