



SPEND & EXPENSE

# 5 things to consider when onboarding clients to BILL Spend & Expense

Guide for accounting firms





# Introduction

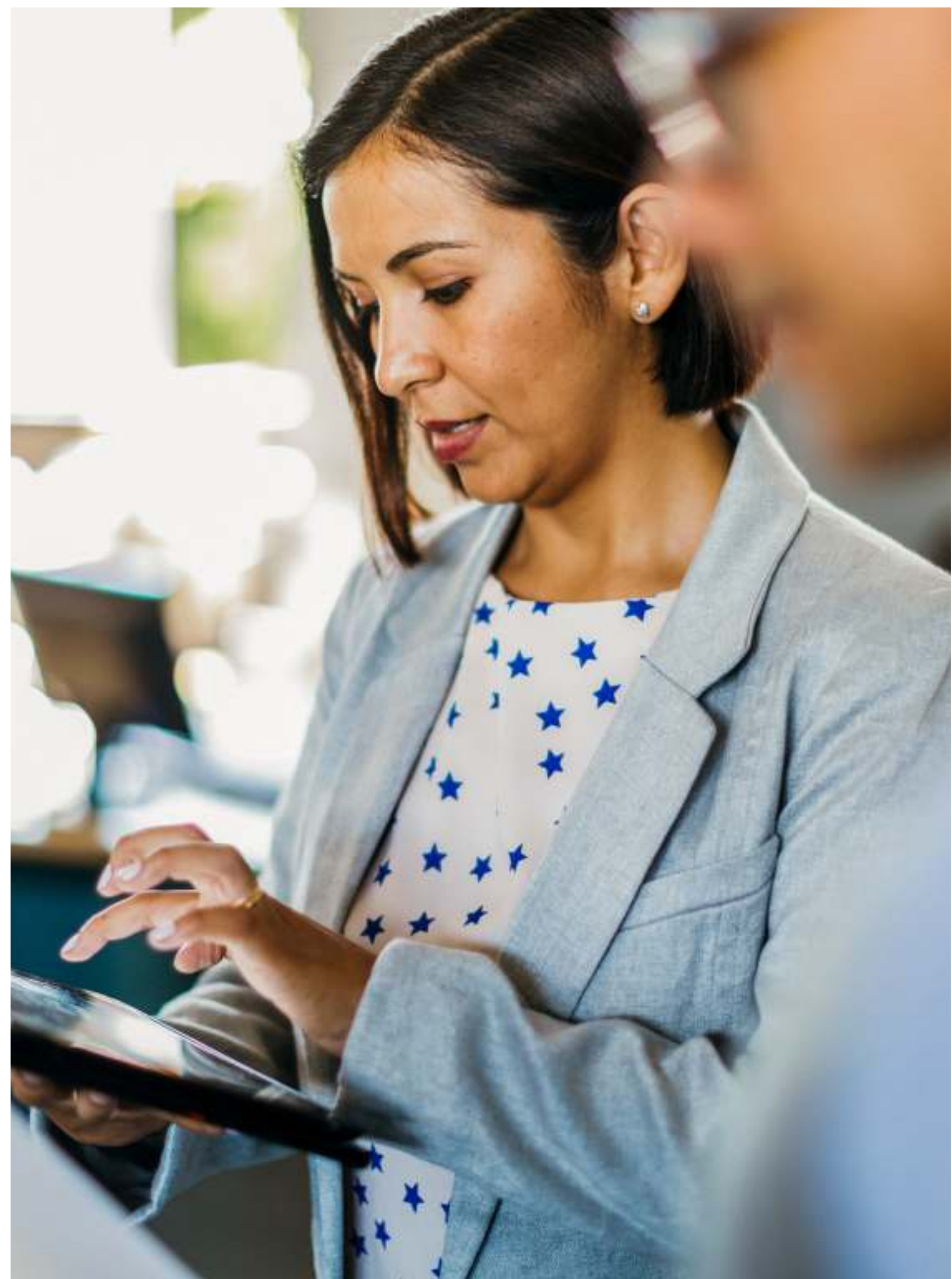
Whether your client has an existing expense management software in place or they're moving into the world of financial automation for the first time, you need to develop a plan you can guide them through and execute as quickly as possible. Generally, we recommend working through these 5 things with your client when onboarding them to BILL Spend & Expense.

## 1. Start small

The most important thing when starting to onboard clients to BILL Spend & Expense is to start small to help those clients not feel overwhelmed. This will allow you time with your clients to refine the budgeting and approvals process on a smaller scale, get incisive and actionable feedback from the first users in an organization, and adjust more quickly where needed.

Overall, creating the opportunity for quicker feedback loops will keep the client from analysis paralysis. It will also give clients who might be hesitant to switch to a new spend and expense management platform the ability to see the difference between the old way and the new BILL way.

If you're new to the BILL Spend & Expense software as well, make sure to connect with your partner manager to get dedicated implementation support for your internal team. They can also help you onboard your first client, regardless of size or complexity, and will be there to support you every step of the way.







## 2. Pick a strategy

Assess your clients' current expense management software and processes. For clients who don't already have a software in place, it might be easier to roll BILL Spend & Expense out to the whole organization from the beginning. For those that already have something in place, it might be easiest to roll it out in stages. Whichever of these strategies you choose, you should take into account your clients' unique needs.

### Rip and replace

This method works best when your client is a small company with few departments or employees. It also works well if they're coming to you with no previous software in place. The strategy is straightforward: you completely shift all company spend onto BILL Spend & Expense at once.

If choosing this method, we still recommend you start small by doing the up front work defining budgets, functionality, and features with a small test group (including running through one month-end close), but it means you and your client will immediately be able to fully enjoy the benefits of BILL Spend & Expense across the organization. If they're paying for another expense management software, this also means they'll be able to eliminate that cost right away.

With this strategy, you can still go back and refine the implementation or layer on additional controls as needed. Even if running BILL Spend & Expense without multiple budgets you'll immediately have a full view of all the company spend to help make those decisions.



## Phased roll out

Regardless of company size, this is the method we recommend most often when first starting to onboard clients to BILL Spend & Expense because it allows you and your clients ample time to test and refine processes and features before rolling out to the entire company. You can determine phases for this kind of rollout in different ways. Common approaches include:

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- One team or department at a time
  - All subscription and recurring spend first
  - Employee travel & expenses first before moving additional company spend
  - A mixture of the above

Each phase does not have to be very long (a single month-end close is usually all it takes to assess and expand). Regardless of the phases you choose, this strategy will give you and your client the opportunity to see the benefits of BILL Spend & Expense vs the old spend and expense processes and continually adjust with each expansion based on feedback and data.

## Specific Tools

As a part of a phased roll out, you can introduce different BILL Spend & Expense functionality and tools one at a time. Different functionality and tools might be:

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- Virtual cards
  - Physical cards
  - Reimbursements
  - Recurring subscriptions
  - Automation Rules



Once the team is successfully using one aspect of BILL Spend & Expense, you'll be able to start training on the next step or functionality. This approach allows you and your clients to start seeing benefits immediately while establishing a plan to transition more complex or larger company spend successfully.



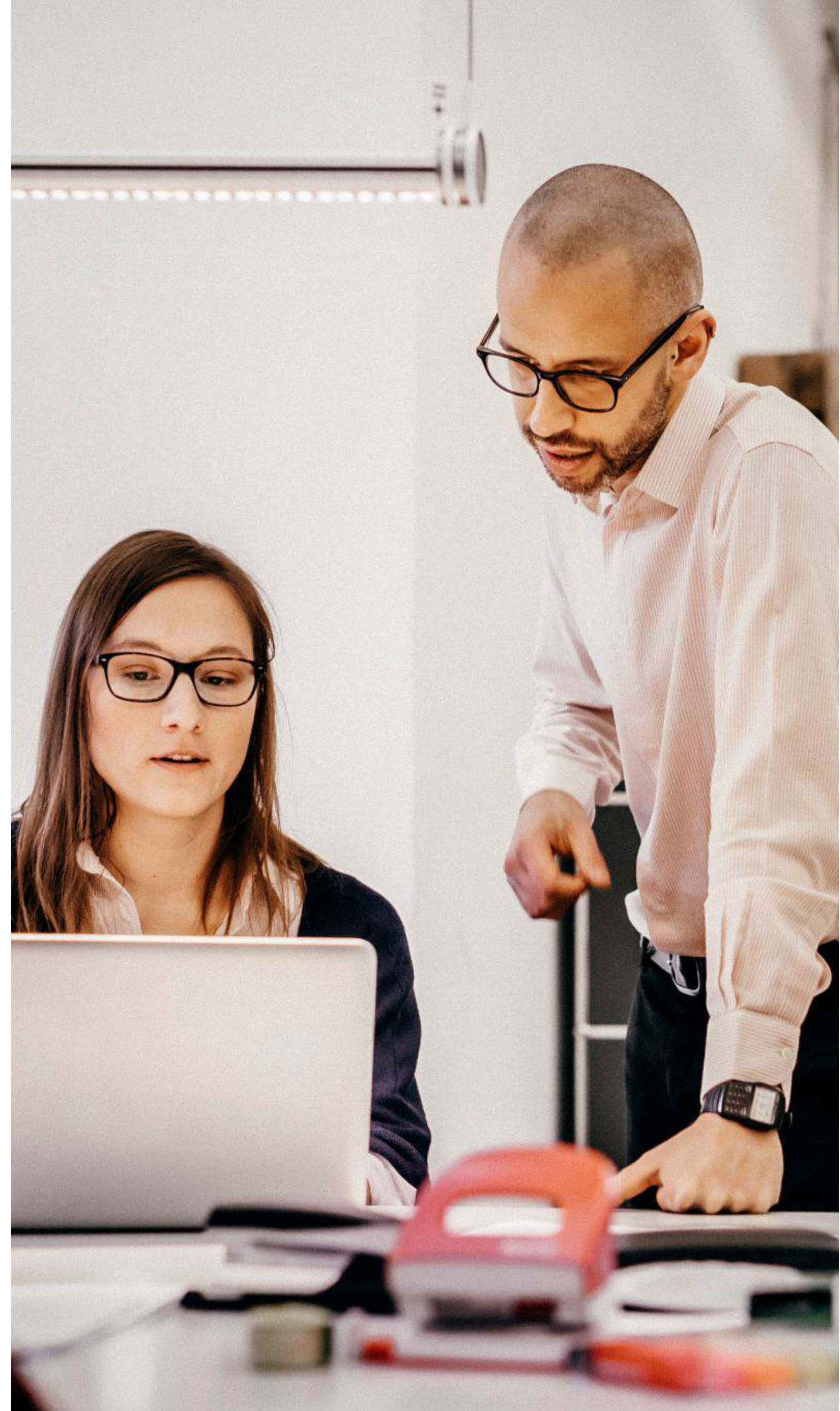
### 3. Choose a budget approach

One of the biggest advantages of switching to a spend management software like BILL Spend & Expense is the ability to set and control budgets. BILL Spend & Expense turns budgets from an exercise an organization goes through a couple times a year to living things that can shift and change in response to business needs.

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#### Questions to answer when deciding which budget approach to use include:

- Should budgets be segmented or will all funds be allocated in a single budget?
- Will budgets be segmented by company, department, team, or project?
- Who should have ownership of day to day allocations of budgets?
- At what frequency will budgets reset? Monthly, quarterly, weekly, or daily?
- Will the company plan on adjusting budgets continually within a budget cycle?
- Are there budgets that will expire or only be used for a limited period of time?
- Will users be given access to shared funds in a budget?



You'll also want to assess whether additional controls on certain budgets (like Merchant Controls) will be needed. Because each business is unique, there's not necessarily a right or a wrong way to approach budgeting. The best budget is the one that is easy to use and actually followed. You'll want to advise your client on whatever budget approach will fit with their company culture and help them reach their financial goals.



## 4. Implement and refine

The practical implementation of BILL Spend & Expense for clients shouldn't be daunting. There are some best practices we recommend, but your implementation plan may look different from client to client. Generally you'll follow these steps:

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1. Collect a roster of all employees at the organization
  2. Identify internal champions to help train, test, and answer questions
  3. Set up the accounting integration
  4. Start spending
  5. Test and refine
  6. Layer in additional controls

**Remember:** the best implementation plan is the one that gets your clients spending as quickly as possible. You might not have everything decided up front. Once your clients are spending on BILL Spend & Expense, you'll need to adjust and refine based on real examples instead of hypotheticals.





## 5. (Re)define an expense policy

One area of a company's finances that will likely need adjustments when implementing BILL Spend & Expense will be the expense policy. Because traditional expense management typically consists of employees using funds up front for business expenses and submitting expense reports for reimbursements, companies often have detailed expense policies in order to guide employees in what things are and are not reimbursable.

BILL Spend & Expense eliminates the need for traditional reimbursements or expense reports. This means BILL Spend & Expense also changes what needs to be included in a traditional expense policy. For example:

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1. Your client will be able to determine how much employees should spend on expenses before the spend ever happens, removing the need to outline and continuously update reimbursable amounts and rates for different expenses like the cost of a hotel room.
  2. Your client can set up budget controls that will ensure funds are spent only on approved items, removing the need to exhaustively define what items are/are not reimbursable in hopes they'll head off non-compliant spend.
  3. Employees will no longer need to use their own funds on company expenses, removing the need to outline complex reimbursement processes and timelines.



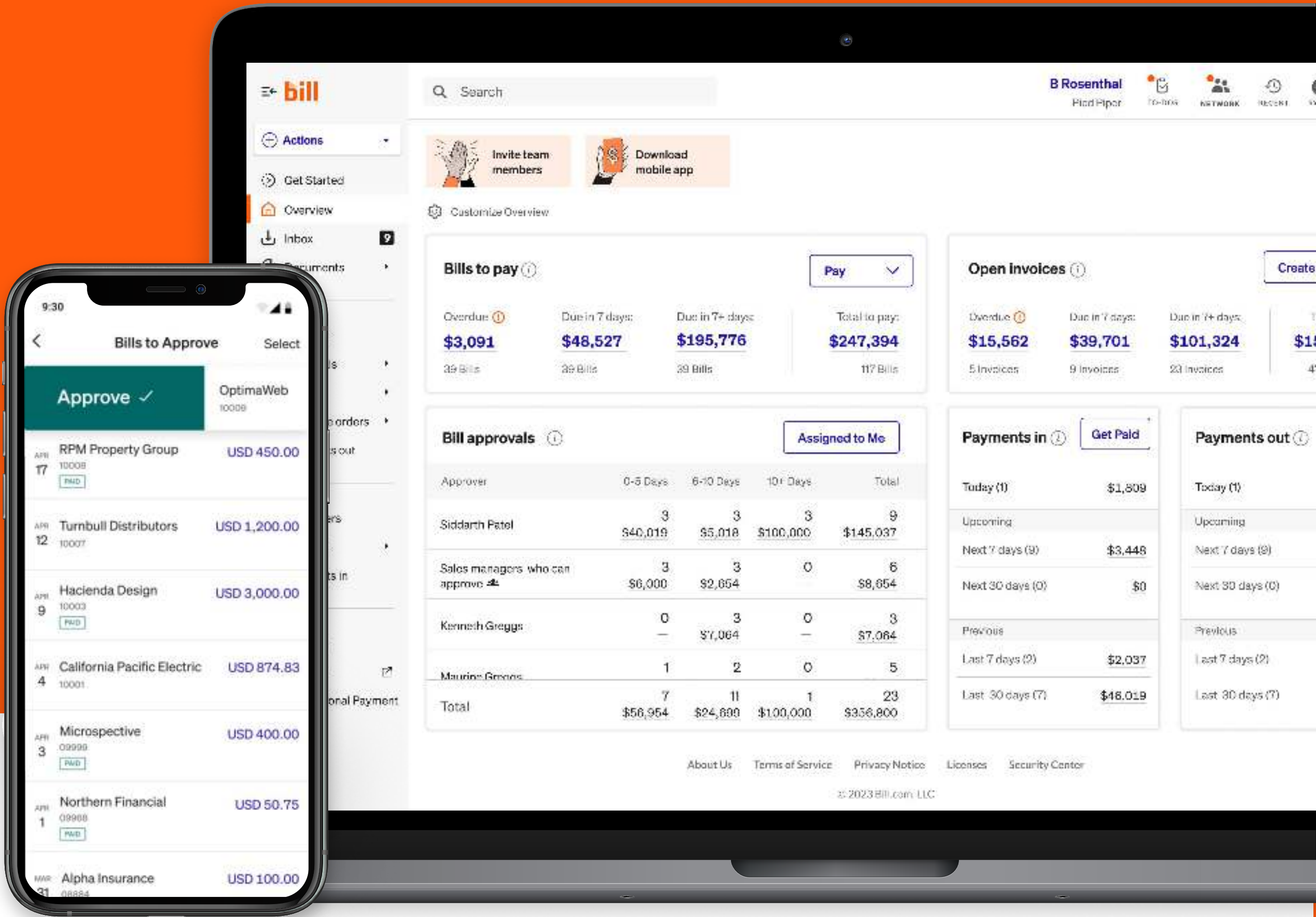
Through assigning users to purpose-built budgets, using budget controls to help ensure employees spend only on approved items, and eliminating the need for employee expense reports, you'll be able to help your client overhaul their expense policy and create something simple and easy to follow. All while giving employees more freedom—and the company more control—and potentially reducing the amount and frequency of non-compliant spend.

To learn more about implementing BILL Spend & Expense for your clients, including resources you can share with them, please visit the [BILL Accountant Resource Center](#).



# Ready to help your clients spend smarter?

Reach out to your partner manager today or visit [bill.com/for-accountants](https://bill.com/for-accountants)



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