



# The Ultimate BILL Spend & Expense Staff Training Guide

As a leader at your accounting firm, you know how important it is that you and your staff are always up to date with the latest news and tools in the accounting industry. Part of running a CAS practice is having the right tools to get a clear picture of your client's finances so that you can properly advise them and help them make the best decisions for their business.

In this guide, we'll go over the most important topics for you to cover when training your staff on how to use and implement BILL Spend & Expense in your firm's offerings. Whether you're just barely introducing BILL into your firm and this is your first time training, or your staff has been using BILL Spend & Expense for a while, these topics and strategies are good for your staff to always have at the top of their minds.

## How to use BILL Spend & Expense

Start by making sure your staff have a complete understanding of how the BILL Spend & Expense software works. If your staff walks away from your training with just one takeaway, it should be a complete understanding of how to use the product—both as an accountant and from a client perspective. This will prepare them for calls with their clients so that they appear knowledgeable and can answer any questions their clients may have about the product.

An easy way to achieve this is by walking your staff through our [clickable product demo](#) to get an overview of how to use BILL Spend & Expense. You can stop and answer questions on any step in the demo to make sure that your staff is understanding. Plus, they can always refer back to the walkthrough in the future.

**Pro tip:** Use your BILL Account Manager as a resource throughout the training. Your Account Manager knows the product like the back of their hand, and would be happy to give your staff an in-depth demo and answer any questions.

## Bonus: How to use the Spend & Expense dashboard to advise clients

One of the best features of BILL Spend & Expense is the live transaction dashboard, where your clients can see every transaction made with one of their BILL Divvy Corporate Cards\* as it happens. Your staff will also have access to this dashboard view for their clients, so they can provide advisory services and forecasting based on that data. Make sure to use some time in the product training to go over how to use the dashboard and give examples of advice that they can provide to your clients using that data.

## How to identify clients

BILL Spend & Expense is a spend and expense management solution that works well for everyone, but some clients will see immediate benefits from switching. Make sure your staff is familiar with the indicators that a client is ready to make the move:

- Organizations of all sizes; though we do see more success for clients who are past the start-up phase.
- Clients whose employees need to use corporate cards for expenses.
- Companies that deal with regular reimbursements (i.e. travel, items for events, etc.).
- Companies that deal with regular subscriptions like software subscriptions.
- Companies that spend money on ads.
- Organizations that regularly give their employees stipends.
- Companies who pay out bonuses or SPIFFs/SPIVs to employees.
- Organizations interested in having a real-time view into everyday company spend.
- Companies who have multiple EINs/entities.

Your staff can also look for signs in your clients' financials during regular check ins or meetings. Things to keep an eye out for are:

- Missing papers and expense documentation
- Disorganized and out-of-date books and files that require cleanup
- Inaccurately coded expenses or expenses missing codes altogether
- Slow, manual accounting and expense management processes
- Excessive spend on software subscriptions and/or duplicate subscriptions

If an accountant on your staff has recently identified a client and referred them to BILL, have them share some of the signals they saw in that specific client's financials that prompted them to have a conversation with that client. You and your staff know your clients best, so having a real example of a client you actually work with can be a valuable tool for helping your accountants understand what they're looking for.

# How to have conversations with your clients about switching to BILL Spend & Expense

Starting conversations with clients about switching to a new expense management solution can be daunting for your staff—we know they're not credit card salesmen! Going over opportunities to refer clients to BILL Spend & Expense and offering guidance can build your staff's confidence and motivate them to discuss it with more clients.

Start by making sure your staff is prepared to navigate conversations with clients. The product walkthrough is not just great for your staff to learn about BILL Spend & Expense—it's also perfect for them to show their clients how it works, and for the clients to explore on their own. Your BILL Account Manager is also a valuable resource here. They're always ready to show a client the beauty of BILL Spend & Expense.

Many clients may still have questions or concerns about switching to a new expense management system. [We've put together a list of the most common concerns](#) we've heard from clients when they're considering switching to BILL—and how to respond to them. Go over these responses with your staff and have them role play the questions, taking turns acting as clients and accountants. They will get comfortable with the responses, and also have an opportunity to address less common concerns that they have picked up from your firm's actual clients.

You can also train your staff on the best ways to start these conversations with clients before the actual meeting. We have a [set of email templates](#) that your staff can use to introduce the idea of BILL Spend & Expense. We also have several [co-marketing materials](#) about Spend & Expense that you can add your firm branding to. These cover the use of Spend & Expense for clients who spend money on ads, or just need a new budgeting and expense management tool.

These tools will help your staff feel more confident and ready to discuss switching to BILL Spend & Expense in their meetings with clients.

## Bonus: How to host a lunch and learn

One great way to talk to clients is to invite them to a lunch and learn with your firm. A lunch and learn is an event hosted by your firm where your clients can learn about BILL Spend & Expense while enjoying a delicious lunch. (The clickable demo makes a great tool to show the service, product, and encourage questions.) They're great events because you can hold them both virtually and at an actual restaurant. For a virtual event, you can send your client a digital gift card or credit to a food delivery service. If you want to hold an in-person event for local clients, we recommend renting out a private space at the restaurant and requiring that your clients sign up beforehand. Your firm may want to set guidelines for how many lunch and learn events you can hold in a certain amount of time.

**Pro tip:** In-person lunch and learns are also an excellent way to get some face-to-face, relationship-building time with your clients outside of your normal meetings. A Bill Spend & Expense event like this can also help grow interest and your referral pipeline.

# How to refer clients

Your staff should be very familiar with the Spend & Expense referral process. It's not a difficult process, but there are several steps. Take some time in your training to go over each step so that your accountants know what their responsibilities are when it comes to referring clients. We explain each of these steps more in depth in our [client referral guide](#).

Your staff should feel confident walking their clients through these referral steps:

1. Identifying clients who are ready to switch to BILL
2. Holding a conversation with clients about switching to BILL Spend & Expense
3. Submitting a referral through the Accountant Console, your firm's referral link, or your firm's Account Manager
4. How to submit an application for clients
5. The client implementation and onboarding process—and which parts they want to be present for

An important detail that you should stress in your training is the variety of ways you can refer clients to BILL Spend & Expense. There are 3 ways to refer clients to BILL, and using these specific methods will ensure that the clients get attributed to your firm in our systems. Your staff can refer clients through the Accountant Console, using your firm's referral link, or by contacting your firm's Account Manager.

## Accountant Console

If you have the BILL Accountant Console, you can add your Accounts Payable, Accounts Receivable, and Spend & Expense clients by clicking the "Add Client" button within the Console. From there, you'll be prompted to fill out some basic information about the client you wish to add. Next, you'll select the BILL products you wish to help your clients with: Accounts Payable, Accounts Receivable, and/or Spend & Expense. [Select "Spend & Expense" to start the application process](#).

## Partner Referral Link

For those partners who do not have a Console, when you signed up for the BILL Accountant Partner Program as a Spend & Expense partner, you received a unique referral link. From that link you can either submit your client's information through the form or have them fill out the self-serve application. If they do fill out the self-serve application, make sure to email your BILL Account Manager the name of the company and person who filled it out so they can keep an eye out for the application. Your Account Manager can also provide this link for you.

## Account Manager

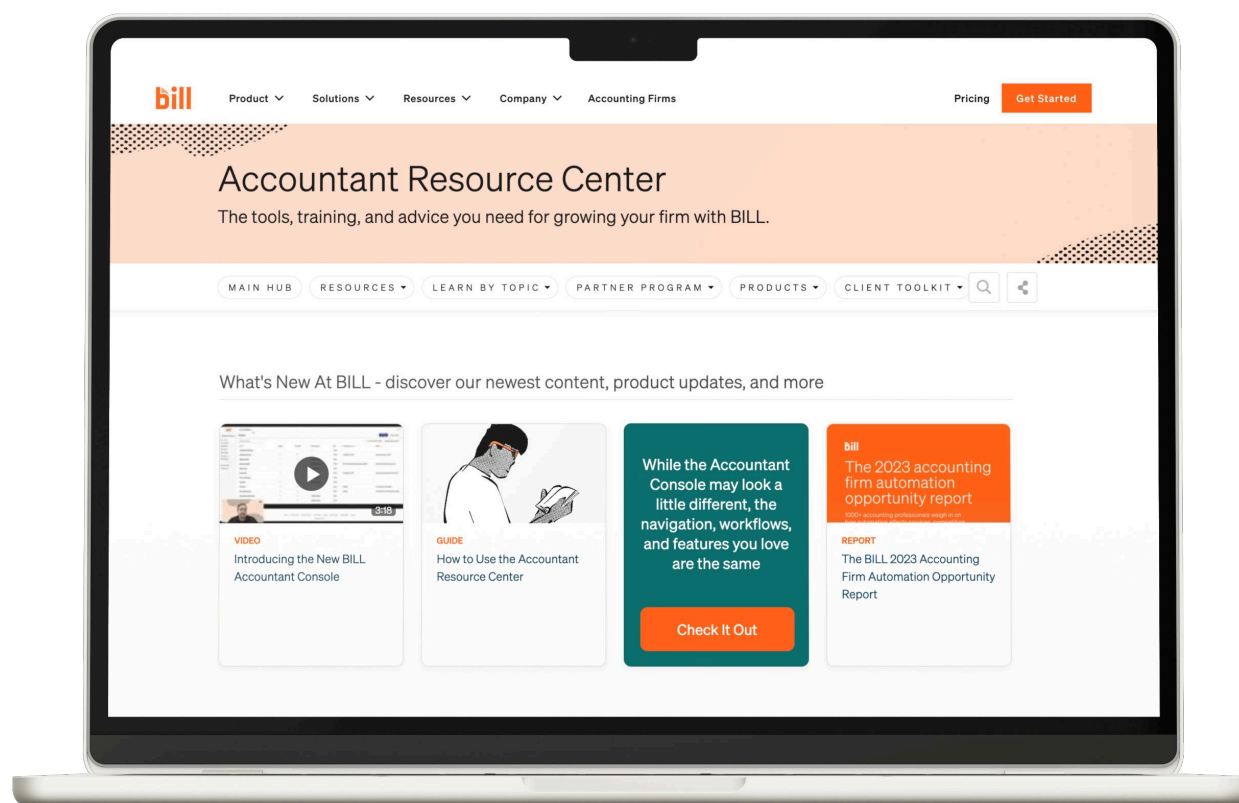
You can also reach out directly to your Account Manager to get the sign up process started. They'll be prepared to answer any questions about the application and setup process. They will also work with you to make sure all the correct information is filled out and your client's account is properly attributed to your firm's account.

# How to use the accountant resource center

We have included resources in this guide to help you build a training session that will empower your staff. But it's just a small portion of what is available on the BILL Accountant Resource Center.

The resource center has many tools to help you build your firm and CAS practice, how to market your services to your clients, how to discuss services with your clients, and more—both for BILL AP/AR and BILL Spend & Expense. We have a collection of webinars, ebooks, checklists, and content from other accountants like the ones at your firm. [Take your staff on a tour](#) of the Accountant Resource Center to familiarize them with the different types of content available to them and where to find them.

Holding regular training sessions with your staff will help them keep their minds sharp and help them effectively use all the resources your firm has at its disposal to provide great experiences for clients. Use this guide and the resources in it to onboard your staff to BILL Spend & Expense and get them ready to use it, or to remind them of the tools they have to recommend BILL to their clients.



*BILL is the all-in-one expense management solution that combines free software with corporate cards to provide you with real-time visibility and customizable control over your business finances.*

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