



Expense Management Made Easy: A Checklist for Mobile Connectivity Costs



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Our checklist is designed to guide managers through selecting, implementing, and managing connectivity solutions effectively for their traveling teams. It provides a structured approach for managers to proactively manage mobile connectivity and ensure cost transparency, making it an ideal tool to reduce the pain points associated with travel expenses.

Expense Management Checklist for Mobile Connectivity

1. Pre-Trip Planning: Selecting the Right Plan

- **Identify Your Team's Travel Patterns:**

Determine usage levels based on travel destinations and job roles, leveraging the ability to tailor plans individually. This includes flexibility for heavy data users or just occasional travelers.

- Frequency and destination of travel.
- Number of employees needing mobile connectivity abroad.

- **Compare Connectivity Options:**

Opt for pay-as-you-go to avoid overpaying for occasional trips, or fixed plans for frequent travelers. Use MTX Connect's tailored plan options to scale data coverage according to team needs.

- Look at pay-as-you-go vs. fixed monthly plans.
- Check if there are options for global and regional connectivity.
- Assess if there are cost-saving benefits for specific destinations.

- **Review Coverage and Network Reliability**

- Ensure reliable network coverage in common destinations.
- Ask about speed and latency, especially in remote areas or travel hubs.

- **Check Data Allowance Options per User:**

- Determine how much data each employee will need.
- Ensure plans allow for flexible data adjustments for heavy and light users.

2. Managing Costs on the Go: Usage and Allowances

- **Set Data Allowances by Employee Role:**

- Determine which employees need higher allowances (e.g., those using video calls) and which need basic data.

- Use the easy-to-navigate portal to define allowances individually, ensuring the right data levels for each role without paying extra for unused data.
- **Control Unapproved Data Usage:**
 - Review if the provider offers data capping or alerts to prevent overages.
 - Use portal access to adjust or restrict usage as needed.
- **Use Real-Time Tracking:**
 - Enable notifications for data usage thresholds.
 - Regularly review each team member's data usage during trips for transparency.

3. Post-Trip Expense Reporting

- **Simplify Reporting with Consolidated Invoices:**
 - Ensure the provider consolidates all team members' data usage into one invoice.
 - Look for breakdowns by user, time, and destination to streamline approval.
- **Automate Expense Reconciliation:**
 - Use automated expense reporting to save time on after-trip paperwork.
- **Prevent Expense Discrepancies:**
 - Minimize potential conflicts over costs by providing accounting and HR with straightforward, user-level data reports—no back-and-forth required.

4. Security and Compliance Checks

- **Verify Security Protocols:**
 - Ensure data is encrypted during transmission.
 - Ensure transparent routing by a licensed operator
 - Confirm compliance with any corporate data security policies.
- **Enable User Access Controls:**
 - Look for role-based access controls for managers and employees.
 - Set permissions for portal access to ensure only relevant team members can view or adjust usage.

5. Ongoing Support and Adjustments

- **Confirm 24/7 Support Availability:**
 - Opt for providers with around-the-clock human support to resolve any issues during travel.
 - **Use Customer Support to Adjust Plans As Needed:**
 - Contact support if travel patterns change or if specific adjustments are required for new destinations or team needs.
 - **Review Plan Effectiveness Quarterly:**
 - Assess if the current plan is meeting cost and usage goals.
 - Adjust allowances or switch plans if business needs shift.
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Bonus Tips:

- **Request a Demo or Trial Period:**
 - Before committing, request a trial to assess connectivity quality, expense management features, and ease of reporting.
- **Set Up Alerts for Potential Overages:**
 - To stay within budget, configure alerts for both individual and total team data usage limits.

For further contact

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