



# 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.