SAP Concur C·

Successful change management leads to:
- Quicker adoption
- User satisfaction
- Increased efficiency

SAP

Change Management Activities Guide   Professional Edition

What is change management?

Whether you're implementing SAP Concur for the first time or expanding to new users, a good change management plan influences how the project (that is, the change) affects people and sets up your organization and your users for success. The activities guide outlines the steps and resources to build a strategy, communicate with and train your users – all while measuring your progress. It's a starting point for both large and small organizations, and we encourage you to make it your own to get the most value from your investment.

Requirements and analysis	Configuration and validation	Deployment and transition	After go live

STRATEGY

Change management strategy template

Be a hero and guide your entire change management strategy by completing this template. Consider background, scope, audiences, roles and more.

PLANNING

Stakeholder analysis

Understand who within your organization this change will impact and to what degree. Your analysis will guide your communication and training approach.

Change impact assessment

Detail all changes that will occur between your current and future states, and describe strategies for addressing those changes.

COMMUNICATION

Communication best practices

Build a communication plan to target the right audience at the right time with the right vehicle and message.

Use these templates after reviewing the best practices:
- Plan and schedule
- Deployment emails
- Posters
- Digital signage
- Info card

MEASURING SUCCESS

Sample surveys: pre-rollout

To successfully demonstrate the value of what you've purchased, it's important to understand your baseline, or your current situation. Have your users complete this survey before go live.

Sample surveys: pilot users

If you're executing a pilot program, be sure to evaluate your users' experiences to improve training, materials and rollout.

Sample surveys: training and rollout survey

Evaluate the effectiveness of end-user training and user preparation for the change. Use this information to discover gaps, reinforce certain points, improve onboarding training and adjust communications.

End-user satisfaction rating

Use these outlined reports to evaluate end-user satisfaction.

Sample surveys: end-user satisfaction

Evaluate end-user satisfaction about 2-6 months after going live.

Reporting optimization

Use these reports to view and track your success against your business objectives.

TRAINING

Training approach

Align training with your holistic change management strategy. Include training methods, delivery, curriculum and how to locate resources.

Concur custom training services

Contact SAP Concur Learning Services for comprehensive assistance with basic or customized training options.

Professional edition only: training administration setup

Use the Training Administration tool to manage your own training landing page for end users:
- Setup guide
- Demo video

Training schedule template

Get specific with your training plan and schedule by including dates, locations, audience and trainers.

Training agenda and scripts

Use the agenda and scripts in conjunction with the presentation to prepare your users.
- Training agenda/high-level script
- Detailed scripts

Training presentation

Use the presentation deck to support training demonstrations and scripts.

QuickStart guides

Use these quickstart guides to prepare your end users:
- Concur® Expense
- Concur® Travel
- Concur® Invoice

Training toolkit

Administrators can find how-to videos, reporting help and training options, including the Customer Learning Series.

Authorized Support Contacts can find Service Description Guides, Getting the Most from Concur Customer Support, and more documentation in the Concur Support Portal after going live.

Developed in partnership with:

ACQUIS

All resources can also be found in the Deployment Toolkit for Professional or Standard editions.   Customer Success Partner | Certified Implementation Partner