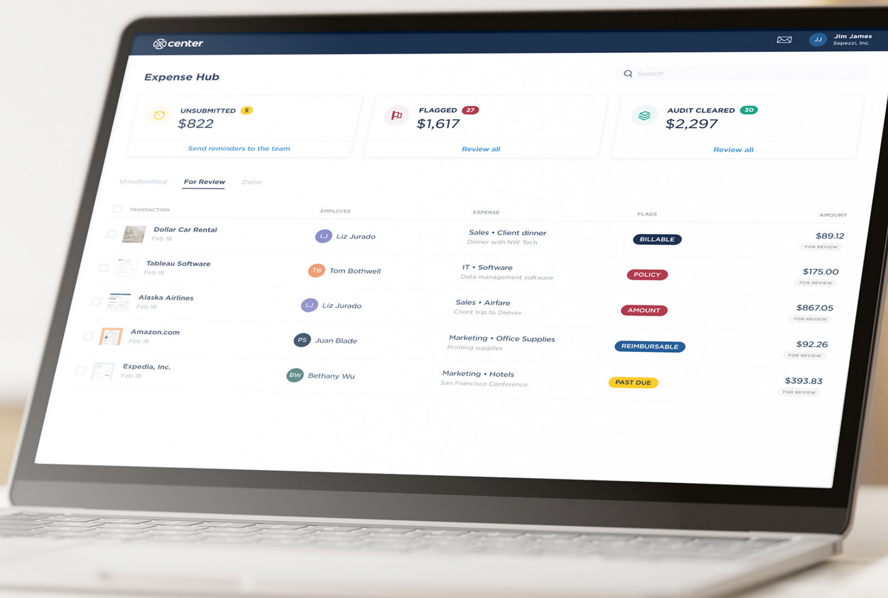
# T&E Policy Rollout Checklist

Ensure smooth adoption across your organization for better employee compliance from the start





**A corporate card with integrated expense software may help you reach your policy goals more effectively**

## Foundation: Set the path for rollout success

The most important step for any change management is clearly articulating what you are doing, why you are doing it, and what you hope to achieve. Before you even begin to draft your new or improved T&E policy, we recommend identifying the following:

- ☐ **Why are you implementing or updating your policy?** Change happens for a reason; what is the reason for this policy change now? What are the objectives, benefits, and expected results? What are the consequences of not changing?
- ☐ **How will you measure success?** Review your desired outcomes. What goals are you aiming to achieve with a new process? What is your timeline to measure? How will you determine success (adoption, time-savings, cost-savings, etc.)?
- ☐ **Who will be impacted?** Your new process may not affect everyone. Identify who it applies to so you know your scope and impact.

## Communication: Create a plan to get everyone on board

Once you can articulate your goals and the reasoning, you can design how your policy will be communicated. Your plan should include your policy introduction, usage and ongoing support, considering:

- ☐ **Awareness:** Without people knowing a change is coming, you'll have difficulty getting them to adopt and comply
- ☐ **Frequency:** Communicate early and often, especially to your impacted groups
- ☐ **Channels:** Do you know how your audience learns best? Consider multiple mediums (emails, newsletters, video, etc.) and where information will be accessed at launch and beyond.
- ☐ **Education:** Will people need to learn a new technology to comply with your policy? Remember to include how employees can get up-to-speed on any new tools in your communication plan.

## Strategy: Best practices to encourage adoption

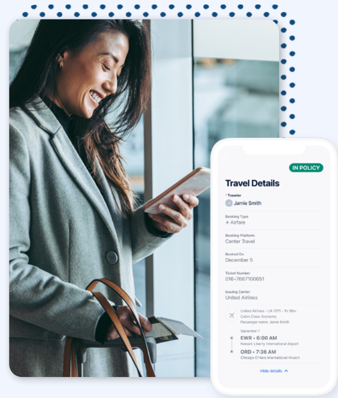
You know why you're rolling out your T&E policy and even have a plan for communicating it. Below are four final tips to encourage successful adoption:

- [ ] **Designate a pilot group of 3–5 individuals who can provide feedback**
  A pilot group can act as your champions of change once the policy has been released and help refine your enforcement plan. Consider having individuals that represent different user groups:
    - Senior leader(s)
    - Heavy user/heavily impacted by the change
    - Approver/manager
    - Early adopters
    - Late adopters

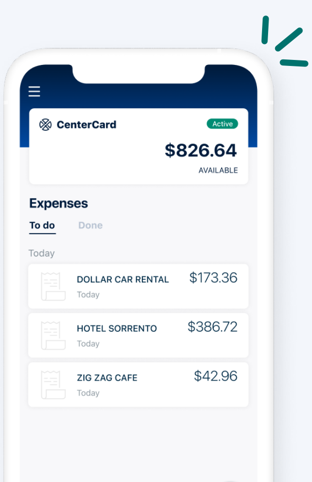
- [ ] **Establish an executive/senior leadership sponsor**
  It's hard to enforce a new policy if your leaders aren't supporting it. Even a simple email conveying their excitement can go a long way.

- [ ] **Consider individual contributions to organizational outcomes**
  Organizational outcomes are the collective result of individual change. How much of your desired outcomes depend on adoption and usage? This can help you define your impacted groups. For example, if outcomes are highly dependent on end-user behavior, you could ensure a heavy focus on educating and communicating with these groups.

- [ ] **Create a plan in case you meet resistance**
  Compliance rarely happens overnight and resistance usually means employees need help understanding/making the change. Consider:
    - Do you have a way to identify who isn't complying?
    - Are there resources to reinforce your "why" behind the policy?
    - Do you need ongoing communications or training beyond the initial rollout?
    - How are you using reinforcement to support and maintain the change?




**Modern expense solutions with integrated data & policy allows spend to be run through corporate policies in real-time, taking lift off of manual enforcement**




## Center simplifies managing employee spend

Center is a complete, connected corporate card and real-time expense management solution that streamlines employee spend, including managed and unmanaged travel, while giving finance teams the control and visibility they need.

**Want to learn more about how Center can transform your company's spend management?**

**Request a personalized demo.**