# eExpense Project Lessons Learned

**Project Name:** GW Expense Reporting (eExpense) System  
**Implementation Date:** 12/12/2012  
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**Project Purpose:** The project will implement a third-party electronic expense reimbursement system from Concur Technologies. This solution will integrate with the GW Travel Portal and will allow for easy electronic submission of expense reports and PCard reconciliation. The eExpense solution will also allow for more efficient audit and validation of expense reports.

For each major component of the project, identify what worked, what didn’t work, and ways to improve the process the next time.

<table>
<thead>
<tr>
<th>Project Component</th>
<th>What Worked</th>
<th>What Didn’t Work</th>
<th>Ways to Improve</th>
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</table>
| **Project Management** | • Cohesiveness. No finger pointing sessions. Team worked well.  
• Escalation process was clear and clearly followed. Knew how to bring up and escalate issues.  
• Having FDs, research involved in project helped quite a bit. Regular meetings with FDs helped as well.  
• Laying out ground rules for operating as a team was helpful.  
• Appropriate interaction with Executives as a team and at appropriate times | • Transition for P-Card from George retiring was overlooked.  
• Some resources were brought in late (P-Card, FSS (Aileen))  
• Did not utilize FDs and OVPR as best we could have. FD roles weren’t clearly defined.  
• Hard to write descriptions of action items to make sense in the future. | • Clearer view of who needs to be included in the beginning of the project.  
• Continue early involvement in project by external stakeholders.  
• Have FDs more actively participate, communicate with their depts and leadership.  
• Active update of AIR by participants. |
| **Proposal Process** | • Well-defined proposal with clear business requirements.  
• Solid understanding of overall objectives.  
• Signature agreement from executive sponsors. | • DIT and Finance didn’t collaborate well on development of the proposal. The relationship was a bit tug-of-war.  
• Under-estimated the number of FTEs required for the project. Felt pressured to lower estimates of FTEs. Too much reliance on vendor estimates.  
• Understanding operational versus project work and impact on project estimates of effort. | • More collaboration between organizations during the proposal process.  
• Continue to build leadership confidence in our estimates. Ensure we’re committing to realistic timeframes and effort. |
| **Planning Process** | • Project Definition Document contained clear escalation procedures, clear definition of how we were to manage the phases.  
• Coordination from | • Schedule tool (MS Project) was utilized strongly in the beginning but fell apart in the end of the project.  
• Have to ensure commitment from participants. Can’t hold up team waiting for pieces of information.  
• Overlooked the non-employee submission process. | • Associating a level of risk with a project path that the vendor has never implemented. ie. Travel first, long delayed Expense go-live, including brand new technology (Web Service callouts)  
• |
| Departmental Process Development | • Well documented process flows. Spent time to really think through process changes for GW. | • Forgot about AP / PCard training right before go live. Emphasized GW but not necessarily the processors. We should have updated this later in the project. • Didn’t document how well we were going to do things internally – cash advance return process. | • Better understanding and documentation of changing processes for the department, including training our own processors (AP and PCard). • Need to also prove that downstream staff understands their responsibilities. |
| Testing | • UAT was very universal – included many different orgs and uncovered some key issues. • UAT had a lot of flexibility on locations and times. • Good process for specs and DIT development. • Good communication and interaction from DIT to FSS. | • Wasn’t enough overall time built into UAT. Was a little overwhelming for some users to learn the system. • May have had too many participants in UAT. It became more of an initial training session. • Struggles with Web Services testing. Concur specs and documentation were challenging causing us to miss some items. | • Make training mandatory for participation in UAT. • Live communication sooner with vendor, rather than email communication to help resolve issues. |
| Deployment Preparation | • Having production cut-over testing was essential and very valuable. • Having GW documented cutover steps. | • Claiming of NetIDs was problematic, especially for the Law School. This was unanticipated. | • Could extend production cutover time period. |
| Communication | • Clear communication milestones and deadlines. Good participation from ER. • Having an individual assigned specifically to this. | • Didn’t communicate well how to search for or find the location, for those who didn’t attend training or read the Infomail. • Pull in the executive admins and assistants earlier. | • Need to continue to have a single resource, aside from the project manager, assigned to manage training. • Have a more defined site visit plan. • FAQs development should have owned |
| Training | • Live training was key to the success of these efforts. • Customized training for some of the key departments and schools. | • One trainer was not enough. And we never intended Lennox to be the only trainer. • Preparing trainer and training should have been done earlier. • Generic training sessions didn’t address school-specific issues. • Didn’t do a great job of reaching directly to faculty or student employees. | • Continue to push live training as primary for large change efforts. • More thoughtful approach to training workload and earlier preparation. • Training school-by-school to address specific issues, faculty and student employees. |