



# Award-Winning Non-Profit Credit Union Achieves Profitable Savings with Concur

## About Center for Community Self-Help

The Center for Community Self-Help, a national non-profit financial institution headquartered in Durham, North Carolina, was recently honored with the Champions of Change Award from the White House. The fastest growing credit union in the US with 6 regional offices, 36 credit unions and facilities in North Carolina, Illinois, and California, the organization provides exceptional, much-needed community services through credit unions, a ventures fund, lending services and policy/advocacy activities. They process more than 120 expense reports every month and manage approximately \$1.5M in travel spend annually, but outdated and inefficient T&E processes could not keep up with Self-Help's rapid growth, success or community impact.

"Our policy/advocacy group travels extensively, and they requested a more efficient method of booking travel and submitting expense reports. They wanted to focus their time on Self-Help's critical work, not on administrative tasks. Many of our travelers are not in the same geographic location as their managers and the paper-based reporting system was slow, inaccurate and time consuming." – Merald Holloway, VP-Director of Administrative Services for the Center for Community Self-Help.

"Concur understands our mission and provides great customer service. We could not ask for better account management or a more responsive partner."

Merald Holloway, VP-Director of Administrative Services, Center for Community Self-Help

## The Concur solution

Self-Help took an incremental approach to the implementation of Concur's automated solutions. Concur® Travel (employees can access policy-approved choices and book travel quickly and easily, including frequent changes to their itineraries) was so successful that the company quickly moved to deploy Concur® Expense with corporate card integration for all travelers, including using Concur® for Mobile. The agency recently deployed Concur® Business Intelligence (providing extensive customized reports) and is considering the addition of Concur® invoice management solution for its



### Company Name:

Center for Community Self-Help

### Solutions

Concur® Travel  
Concur® Expense  
Concur® Business Intelligence  
Tripit Pro

### Industry

Non-Profit Financial Services

### Company Size

500 employees

### Location

Durham, North Carolina

### Why Concur

- Complete visibility into travel spend
- Real-time credit card data integration
- Convenient mobile application

Real Estate Division.

“Some of the greatest benefits from an accounting standpoint”, says Holloway, “are improved accuracy (elimination of duplicate data, a common problem with manual data entry) and increased efficiency. We have one FTE devoted to T&E processing and that job has become significantly more manageable since the implementation Concur solutions.”

With Concur, Self-Help:

- Travelers submit expenses for review by managers anywhere, anytime. A fast, convenient process that saves time and has accelerated reimbursement.
- Established benchmarks and strengthened travel policies with complete visibility into travel spend enables.
- Eliminated surface mail submission of documents and storage of expense reports and receipts.
- Keeps the books balanced with real-time credit card data integration and 100 percent accuracy in day-to-day reconciliation.
- Makes smart travel choices with instant access to policy compliant travel options.

“We’re a small account, but Concur treats us as if we’re their most important client. Concur understands our mission and provides great customer service. We could not ask for better account management or a more responsive partner.”

Merald Holloway, VP-Director of Administrative Services,  
Center for Community Self-Help

