



## Pre-Trip Approval Helps Rockwell Hit Savings Target

### *On Decision to Go With Pre-Trip Approval:*

*“With post trip review, we wouldn’t capture as much savings as we’ve had. Something drastic had to be put in place. It may not be a 100% solution for the long term, because it does create delays; still, it’s a great catalyst to change the culture.”*

*—Rebecca Germain, Manager Strategic Sourcing Organization*

Rockwell Automation Inc. is a leading global provider of industrial automation control and information solutions with \$22M in annual air spend. The company employs 19,000 people serving customers in over 80 countries.

### **Goal: “Changing the entire culture of how we travel.”**

Rockwell wanted to move from a non-mandated culture and balance the organization’s focus on sales and growth with more a more regimented focus on financial controls. Rockwell was also looking for aggressive cost savings and compliance across core dimensions (e.g., increased use of advance purchase and non-refundable tickets and decreased use of business class fares).

### **Solution:**

Rockwell implemented stricter travel guidelines and re-launched its T&E policy with a formal mandate and executive

sponsorship. The new policy was supported by deployment of an automated pre-trip approval tool that flags policy violations for modification and/or manager approval. Travel Demand Management exception reports (consolidated travel, card and expense reporting data) go to finance VPs and controllers for each business unit and a list of repeat offenders goes to the CFO. Incentives are being developed as a next step in the program.

### **Results:**

Rockwell saved \$1.03M within the first quarter of deploying the pre-trip approval tool. The company is on track to hit its T&E savings target in year one of the program. Additionally, advance purchase ticket usage (+27%) and non-refundable ticket usage (+32%) have increased, while business class usage (-42%) has decreased.

