

# Small Business Financial Services Company Sees ROI in less than a month with Certify

## Introduction

This case study of a small business financial services company is based on an August 2020 survey of Certify customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.

Certify has created time savings and provided excellent reporting.

## Challenges

The business challenges that led the profiled company to evaluate and ultimately select Certify by Emburse:

Prior to using Certify, this financial services customer struggled with:

- Timely submission of reimbursable expenses
- Timely submission of corporate card expenses
- Long reimbursement times

## Use Case

This financial services customer said they were **very satisfied** or **extremely satisfied** with the following aspects of Certify:

- Reduce errors caused by manual data entry
- Increase visibility into spend
- Help ensure policy compliance
  - \*Improve the ability to make data-driven decisions and contribute to business KPIs
- Reimburse expenses faster
- Save time by automating manual tasks
- Provide better oversight into costs and expenses

This financial services customer said they find the following functionality **extremely valuable** from Certify:

- Expense report creation speed
- Receipt capture
- Ease of use
- Mobile app
- System reliability

## Results

The surveyed company achieved the following results with Certify by Emburse:

Compared to other vendors this customer used, they rated Certify as **Significantly Better** or **Best in Class**:

- Policy control
- Expense report creation speed
- Credit card reconciliation
- Ease of use
- Mobile app
- Support & training
- System reliability

This financial services customer said they **strongly agree** with the following statements:

- Certify helps us better predict spend
- Certify support is best-in-class
- Certify removes manual work and allows our finance team to be more strategic
- Certify helps us automate previously manual work and support a remote workforce

This customer said that Certify has helped achieve the following results

- Save finance teams time so they can focus on more meaningful and strategic work
- Increase productivity by automating mundane, manual tasks
- Improve employee morale and work-life balance
- Reduce stress associated with expense and/or invoice management
- Enable remote work with cloud-based, paperless solutions

Since using Certify, this customer said their finance team has **saved between 2-4 hours a month** and they **saw a return on their investment in under 1 month**

### Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:  
**Small Business**

Industry:  
**Financial Services**

### About Certify by Emburse

Certify is the leading online spend management solution for companies of all sizes. Organizations worldwide book travel, complete expense reports, and digitize the procure-to-pay process quickly and easily using Certify cloud and mobile applications. For more information about Certify, please call +1 207 773-6100 or visit [www.certify.com](http://www.certify.com).

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