

THE EXPENDESK™ FRAMEWORK

Expense Management Maturity Assessment

Evaluate your expense process in less than 15 minutes.

Is your organization spending more time managing expenses than growing the business?

From delayed reimbursements to manual approvals and limited spend visibility, inefficient expense management quietly reduces productivity, impacts employee experience, and limits financial control.

This assessment helps you evaluate your expense management maturity across **seven critical business areas** — and uncover opportunities to improve efficiency before they become costly.

25

QUESTIONS

7

MATURITY PILLARS

15 min

TO COMPLETE

Why This Assessment Matters

Growing businesses rarely struggle because they lack revenue.

They struggle because their internal operations fail to scale — and one of the first systems that breaks is expense management.

AS TEAMS GROW...

- Expenses multiply across teams and tools
- Finance teams become overwhelmed
- Leadership loses visibility
- Approvals become slower
- Employees wait longer for reimbursements

The result isn't just operational inefficiency. **It's slower business growth.**

What You'll Evaluate

Instead of asking, *"Do we need expense management software?"*

Ask: **"How mature is our current expense management process?"**

The Expendesk Expense Management Framework™ — 7 Pillars

1 Expense Submission

2 Employee Reimbursements

3 Approval Workflows

4 Expense Policy & Compliance

5 Spend Visibility

6 Reporting & Audit Readiness

7 Finance Productivity

HOW TO SCORE

For each statement, check one box: **Yes = 2 points** · **Partially = 1 point** · **No = 0 points**.
Tally each pillar as you go.



PILLAR 1 OF 7

Expense Submission

Goal — How easily can employees submit legitimate business expenses?

STATEMENT	YES	PARTIAL	NO
01 Employees can submit expense claims digitally.	☐	☐	☐
02 Receipts are uploaded and stored digitally.	☐	☐	☐
03 Employees know exactly what expenses can be claimed.	☐	☐	☐
04 Expense submissions follow a standardized company format.	☐	☐	☐

PILLAR 1 SCORE

/ 8



PILLAR 2 OF 7

Employee Reimbursements

Goal — How efficiently does your organization reimburse employees?

STATEMENT	YES	PARTIAL	NO
05 Employees can track reimbursement status.	☐	☐	☐
06 Reimbursements happen within defined timelines.	☐	☐	☐
07 Finance rarely receives follow-up emails about reimbursements.	☐	☐	☐
08 Employees trust the reimbursement process.	☐	☐	☐

PILLAR 2 SCORE

/ 8

3

PILLAR 3 OF 7

Approval Workflows

Goal — Are approvals efficient, transparent, and scalable?

STATEMENT	YES	PARTIAL	NO
09 Approval workflows are clearly defined.	☐	☐	☐
10 Managers approve claims within expected timelines.	☐	☐	☐
11 Escalation rules exist for pending approvals.	☐	☐	☐
12 Approval status is visible to employees.	☐	☐	☐

PILLAR 3 SCORE

/ 8

4

PILLAR 4 OF 7

Expense Policy & Compliance

Goal — Does everyone follow the same rules?

STATEMENT	YES	PARTIAL	NO
13 Expense policies are documented.	☐	☐	☐
14 Employees understand reimbursement policies.	☐	☐	☐
15 Out-of-policy claims are automatically identified.	☐	☐	☐
16 Expense approvals consistently follow company policies.	☐	☐	☐

PILLAR 4 SCORE

/ 8

5

PILLAR 5 OF 7

Spend Visibility

Goal — Can leadership clearly understand where company money is going?

STATEMENT	YES	PARTIAL	NO
17 Leadership has real-time expense visibility.	☐	☐	☐
18 Department-wise spending can be viewed instantly.	☐	☐	☐
19 Monthly expense trends are reviewed regularly.	☐	☐	☐

PILLAR 5 SCORE

/ 6

6

PILLAR 6 OF 7

Reporting & Audit Readiness

Goal — Is your organization always prepared for audits?

STATEMENT	YES	PARTIAL	NO
20 Expense records are centrally stored.	☐	☐	☐
21 Reports can be generated quickly.	☐	☐	☐
22 Supporting documents are audit-ready.	☐	☐	☐

PILLAR 6 SCORE

/ 6



PILLAR 7 OF 7

Finance Productivity

Goal — Is your finance team focused on strategy rather than administration?

STATEMENT	YES	PARTIAL	NO
23 Finance spends minimal time verifying expenses.	☐	☐	☐
24 Month-end reconciliation happens efficiently.	☐	☐	☐
25 Expense management scales without increasing administrative workload.	☐	☐	☐

PILLAR 7 SCORE

/ 6

Your Score

SCORING KEY

Yes = 2 points **Partially** = 1 point **No** = 0 points

Add your seven pillar scores together for your total.

TOTAL SCORE

/ 50

What your score means

Critical Risk

0–15

Your expense process is highly manual and likely creating unnecessary operational costs.

Typical symptoms: delayed reimbursements · approval bottlenecks · poor visibility · high finance workload

Recommendation: Immediate process review recommended.

Needs Improvement

16–30

You have foundational processes, but manual work is limiting growth.

Recommendation: Begin automating high-impact expense workflows.

Operationally Mature

31–40

Your processes are working well, but further automation could unlock additional efficiency.

Recommendation: Optimize visibility, reporting, and analytics.

Best-in-Class

41–50

Congratulations — your organization demonstrates mature expense governance.

Recommendation: Continue optimizing through automation and advanced reporting.

Key Takeaways

After completing this assessment, ask yourself:

- Can employees submit expenses effortlessly?
- Are reimbursements fast and transparent?
- Does leadership know where money is being spent?
- Can finance focus on analysis instead of administration?
- Can our process scale with business growth?

READY FOR THE NEXT STEP?

The assessment finds the gaps. Expendesk eliminates them.

Book a personalized demo to see how growing businesses automate expense tracking, reimbursements, approvals, and spend visibility — from one centralized platform.

Book My Demo →

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