How T.D. Williamson introduced company-wide compliance and saved auditors time

The problem

A fragmented expense management process hindered progress

Prior to AppZen, T.D. Williamson lacked an efficient system for auditing employee expenses. Their highly manual process proved unsustainable as the company grew. Although their lean team of 3 auditors worked hard to keep pace with the company's increasing complexities, patchwork approval processes and limited visibility underscored the need for a more sophisticated solution.

"We had no insight into our people following the policy or managers approving things consistent with policy," reflects T.D. Williamson's Corporate Treasurer, Andrew Aguirre. "We were a little bit in the dark."

Expense approvals varied across managers, leading to organizational inconsistencies. This lack of standardization made ensuring company-wide compliance impossible, forcing auditors to waste valuable time tracking out-of-policy spend.

As their manual system's limitations became increasingly problematic, the company sought a comprehensive solution. They wanted the ability to auto-approve low-risk expenses and consistently enforce policies across teams. An ideal solution would also provide deeper insights into global spending and bring about positive changes in employee spend behavior.

The solution

AI-powered, automated policy enforcement and real-time insights

T.D. Williamson implemented AppZen Expense Audit alongside their existing expense management system, allowing them to make an immediate impact without disrupting existing workflows or requiring additional resources. "We were able to really leverage existing employees," Aguirre explains.

Andrew's team modernized their finance operations, using AppZen's AI-powered solution to:

- Review every expense report automatically, flagging only high-risk lines for manual review
- Roll out consistent policies across all employees, eliminating approval discrepancies
- Gain real-time visibility and insight into spending patterns
- Adjust risk thresholds and create department-specific rules to optimize approval processes
- Create an automated, scalable feedback loop to instantly notify employees of policy violations so they could make better spending decisions

9,000
Expense audits, annually

3
Full-time auditors

65%
Auto-approval rate

100+
Hours saved in 3 months

About the company:

T.D. Williamson, a leader in the oil and gas industry, has helped pipeline owners and operators deliver energy safely and efficiently for over 100 years.

Industry:
Pipeline Services

Employees: 1,500+

AppZen Products:
Expense Audit, Mastermind, Spend Audit, AppStore

"We didn't have to go out and add resources from a human capital standpoint because AppZen did the vast majority of that work."

Andrew Aguirre,
Corporate Treasurer, T.D. Williamson

The result

Company-wide consistency and auditing efficiency

Expense Audit helped the team completely eliminate the need to review low-risk expense lines, resulting in a 65% decrease in manual reviews. "We're [now] able to process 9,000 expense reports with just three auditors," Aguirre notes.

With almost 3/4 of their time freed up, his team could focus on uncovering cost savings and encouraging behavioral course corrections. For example, they were able to drill down on recurring issues that initially seemed like minor expenses but added up over time, such as rental car fees.

The consistency of policy enforcement also markedly improved. Now, employees are held more accountable. They know that anything flagged as high risk will be double-checked by someone other than their direct manager. Naturally, this has led to a shift in employee behavior and compliance. Automated, real-time feedback helps managers and the finance team coach employees to better understand policies, rather than reprimand them after submitting expenses.

"Departments and teams are dynamic, and they change every month or week depending on your organization. You need reports that are very automated in nature and don't require a lot of customization. All that data and customization is happening behind the scenes."

Looking ahead

Expanding end-to-end finance operations with AI

With the success of Expense Audit, T.D. Williamson is exploring additional ways to reduce spend, apply existing resources more effectively, and drive compliance at scale.

Team Intelligence
Policy enforcement is now consistently applied across the company, allowing Andrew and his team to focus on more department-specific reporting using Team Intelligence. Its ability to customize reports lets them to hone in on the nuances of each team.

Card Audit
Accounts payable and spending across corporate cards are also big priorities. Historically, many companies have had to find leaks, misuse, and fraud the hard way, losing thousands of dollars. Their goal is to catch those bad actors while building stronger compliance and controls like their T&E operations.

"In some companies, there might be an established internal audit function to go out and do some of these things. We had none. That's where AppZen came into place and really started to help us perform that internal audit function that didn't exist in the past."

Andrew Aguirre,
Corporate Treasurer, T.D. Williamson