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– Marshall Thomason, Controller



## FISCALNOTE SUCCESS HIGHLIGHTS

- Scaled with team as staff has grown 5x
- 6x faster than Excel
- UX/Support team win

## Company Overview

FiscalNote GRM, the revolutionary government relationship management platform, is now the most effective tool for influencing federal, state and local governments. By dramatically improving how organizations build and manage their relationships with all levels of government, and through the use of proprietary analytics and breakthrough machine-learning techniques, FiscalNote GRM enables maximum impact on government legislation and regulation. FiscalNote was honored as a 2016 World Economic Forum (WEF) Technology Pioneer, and founder Tim Hwang was awarded the title of WEF New Champion.



## Beta and Beyond

FiscalNote has known TravelBank from the very beginning. "We first met CEO Duke Chung before TravelBank even launched," says Marshall Thomason, FiscalNote's Controller. "We were looking for an inexpensive solution and they were looking for user feedback when the beta launched, so it was a really good match from the start." At that time, the 65-person FiscalNote team was using Microsoft Excel as their main expense reporting tool. "With Excel, there's a ton of manual effort to reach out for approvals to department heads and add the expenses to payroll," says Marshall. "Our main goal with signing up and joining TravelBank was to automate a lot of these redundant tasks that we were doing by hand with prior inefficient processes."

## Sharing the Savings

FiscalNote quickly implemented expense tracking and reporting, but was initially unsure about using TravelBank's rewards feature, a tool that allows employees to share the savings when they come in under budget. To better assess the rewards feature, FiscalNote's finance team carried out independent research and conducted an internal stress test against TravelBank budgets for precision and savings. They were delighted to find TravelBank was extremely accurate, and soon after, they began using the rewards feature and offering incentives to their employees. "We know that TravelBank's algorithms are best in class, and that by using them, we're saving the most money," says Marshall. "Plus, it's really been able to give department heads a way to manage their employees' travel and cut down on those expenses."

As FiscalNote grew its staff by over 5X, Marshall also discovered how easily TravelBank scaled. "It has absolutely grown with our team," says Marshall, "and by the time finance gets the expense reports and the expenses approvals, they're pretty much ready to go." Sammi DiBella, a Senior Accountant at FiscalNote, discovered how simple it is to handle reports with TravelBank's intuitive UX. "It's very user friendly," she says. "As an admin, it's been easy to customize for our unique and ever-changing organizational structure, and the support team has been really great—they get back to me pretty much right away."



## Budgets Done Right

Since working with TravelBank, FiscalNote has seen some radical changes. "It probably took us six times longer to work with Excel than TravelBank," says Marshall, and the benefits go far beyond efficiency. "The product team is very open to feedback and hearing about what works well," says Sammi, "They really take the time to explain and listen, and that's been really helpful from the user side."

From beta testing to full implementation, FiscalNote has been incredibly happy with the overall relationship and looks forward to TravelBank's next steps. "Something that stands out to me is their innovation," says Marshall. "They're able to move so quickly, and it's been incredible to see how fast the product has progressed and revolutionized the way existing systems have done things. They're just getting faster with their development cycles, and I'm excited to see where TravelBank is going in the future."

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