



Case Study

Expense Reporting at Yorkshire Building Society

How greater cost visibility helped them achieve 30% savings



30%
Savings on business telephony

3300
Employees Engaged

Challenge

Yorkshire Building Society (YBS) faced rising mobile phone costs and lacked insight into employee usage patterns. To improve visibility and control, YBS partnered with Finfo to provide branded reports, automated tracking, and direct engagement tools for employees.

Outcome

This partnership led to a 30% reduction in mobile expenses within the first year, driven by increased transparency and data insights. With a 92% report open rate and strong employee engagement, YBS saw significant cost benefits and selected Finfo as a long-term partner for IT cost reporting services.

Headquarters Bradford, UK	Founded 1864	Industry Financial Services	Employees 3,300
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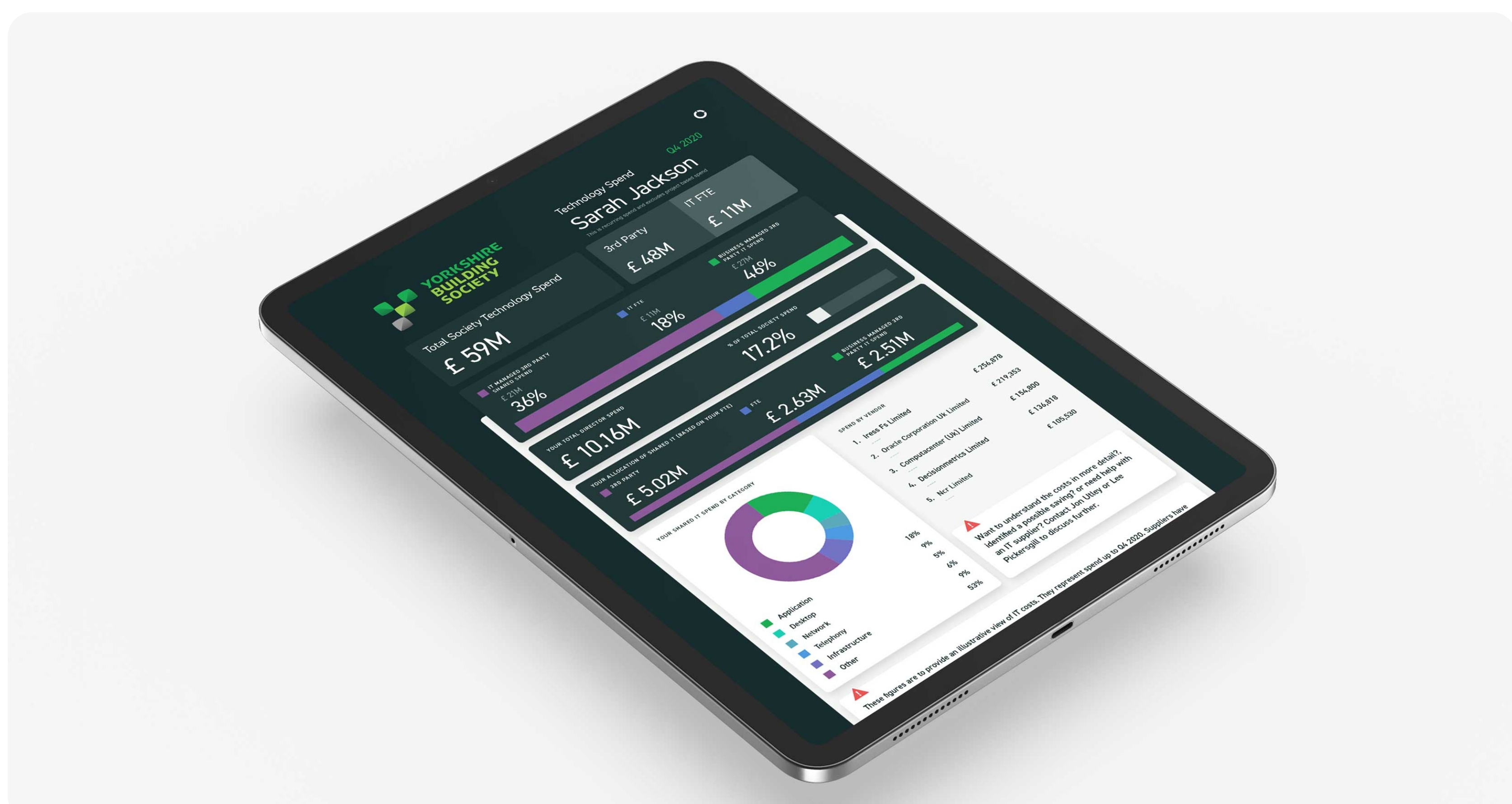
About YBS

Yorkshire Building Society (YBS), headquartered in Bradford, West Yorkshire, is the UK's third-largest building society. With a network spanning 132 branches and 99 agencies across the UK, YBS serves over 3 million members and employs more than 3,300 people. Despite recent industry shifts, YBS maintains its standing as a key player in Britain's mutual building society sector.

Challenges & Objectives

Amidst rising operational costs, YBS recognised the need for improved governance over its business mobile phone expenditure. The goal was to engage employees by providing visibility into their usage patterns, encouraging self-regulation while enabling management to make informed decisions based on accurate data insights. To address these objectives, Finfo partnered with YBS to deliver a comprehensive mobile spend analytics solution with the following key aims:

- 01 Provide detailed, YBS-branded reports on mobile phone expenditure.**
- 02 Establish an automated system for streamlined phone usage tracking, designed to reduce costs and educate employees on usage best practices.**



YBS IT Reporting

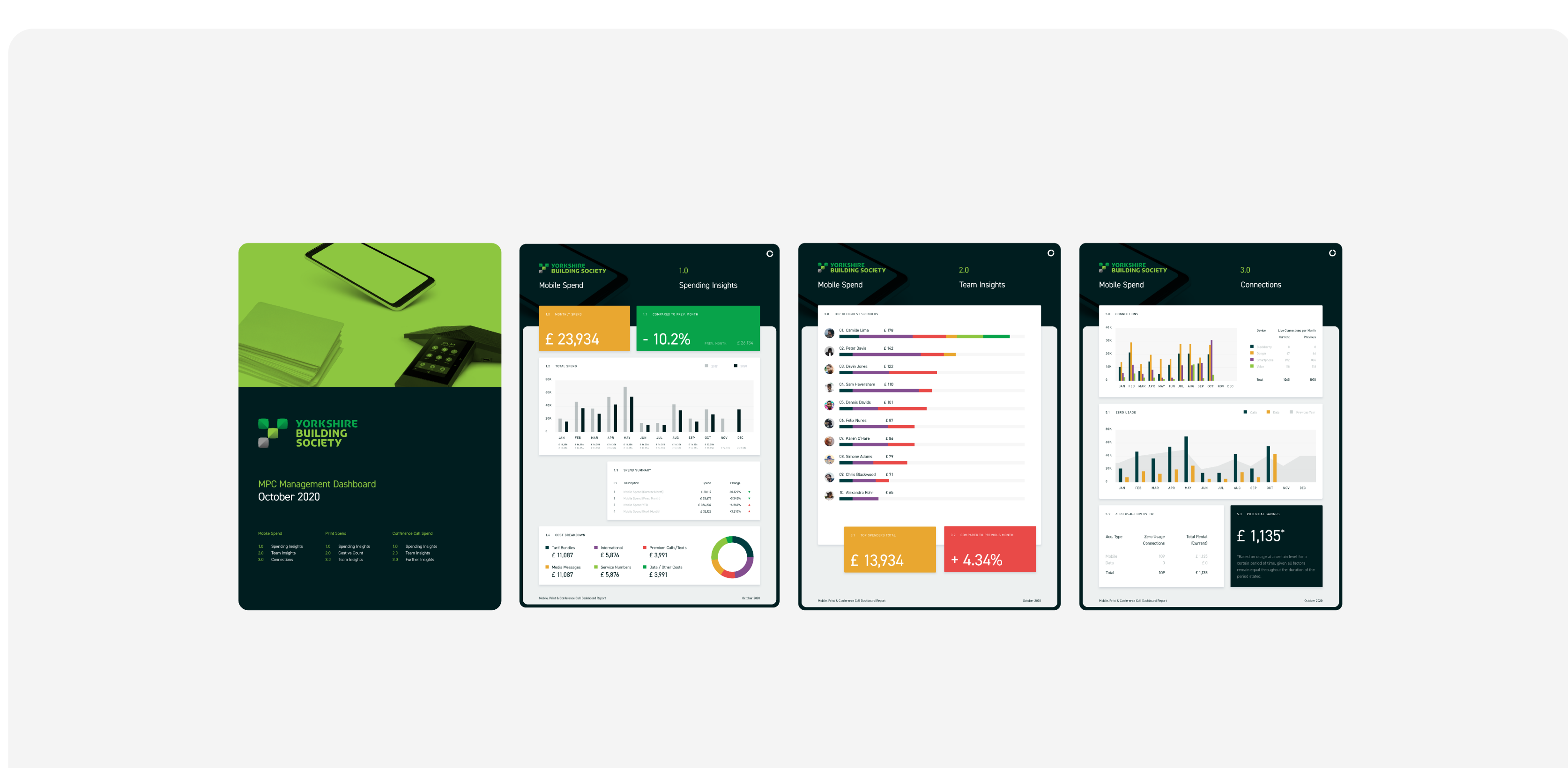
Solution & Implementation

The solution was designed to drive both transparency and efficiency through a range of tools and processes tailored to YBS's needs, including:

- 01 Enhanced Cost Awareness and Employee Engagement**
Delivered branded infographic reports to employees via email and SMS, offering insights into individual spending habits and encouraging prudent usage.
- 02 Accurate, Actionable Data Insights**
Analysed service provider data to ensure accuracy, with automated reporting providing actionable insights and identifying cost-saving opportunities.
- 03 Management-Focused Reporting**
Tailored reports and data-driven dashboards equipped management with real-time visibility into trends, supporting cost centre and departmental oversight.
- 04 Comprehensive Support and Supplier Management**
Finfo's managed helpdesk and supplier engagement ensured consistent, responsive support across the organisation.

"Integration was seamless. We now see Finfo, and the Finfo reports as an extension of the work we do here."

Andrew Ellison, YBS



YBS Mobile Spend Management Dashboard

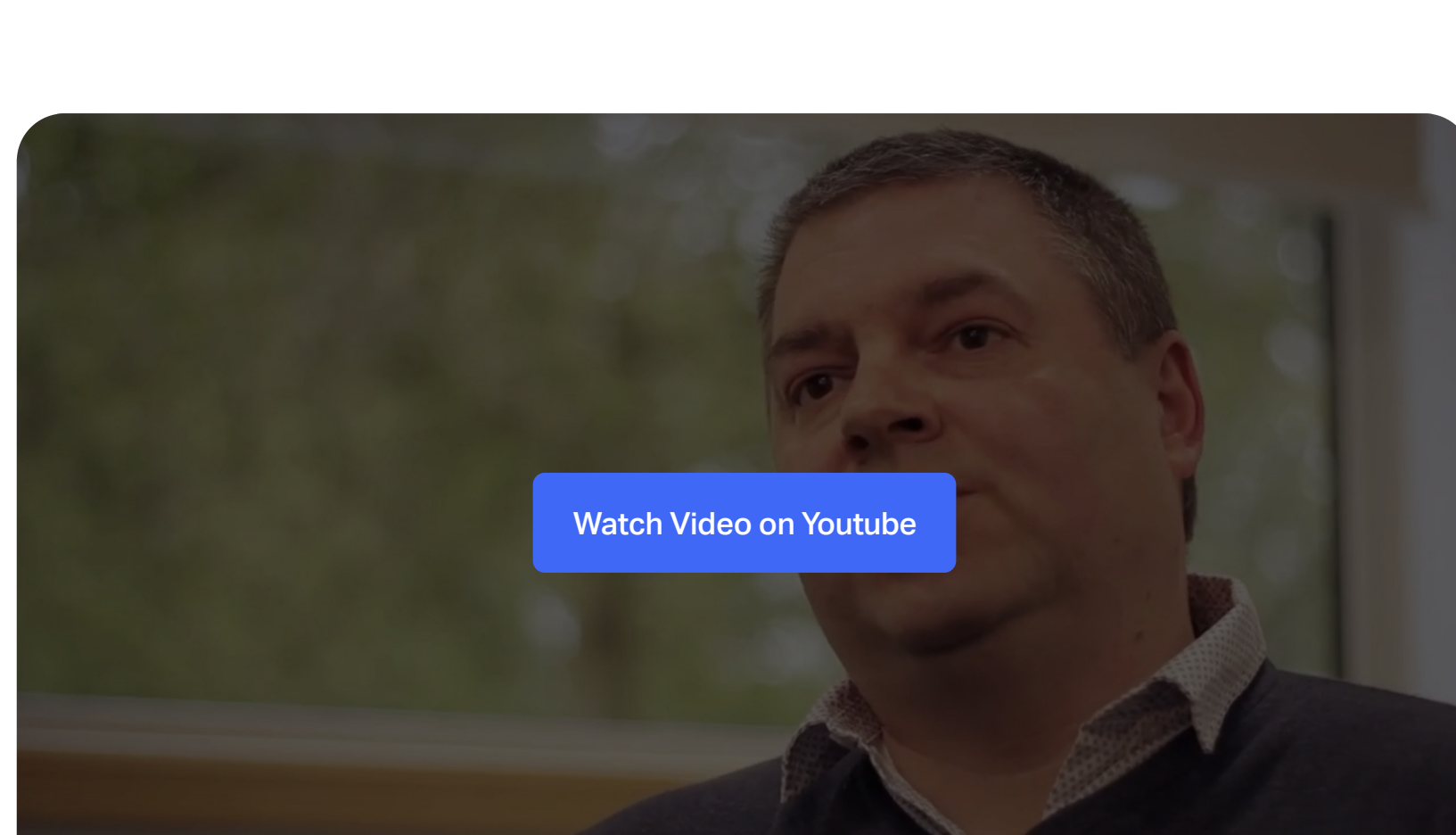
The example above is taken from a larger Mobile-Print-Conference Call Report. This was issued monthly via email to directors and upper level management.

Outcomes & Impact

Through targeted visibility and analytics, YBS realised significant improvements:

- 01 Increased Reporting Efficiency**
Over 30,000 infographic reports were delivered, reaching 2,200 employee inboxes with a 92% open rate, allowing employees to digest key insights in under 20 seconds.
- 02 Cost Reductions**
YBS achieved a 30% reduction in mobile phone expenditure within the first year, attributed to improved visibility, self-regulation, and strategic usage adjustments.
- 03 Enhanced Partnership**
Following this success, YBS selected Finfo as a primary partner for all IT cost reporting services, cementing a collaborative relationship for continued optimisation.

The collaboration with Finfo transformed YBS's approach to mobile cost governance, aligning employee behaviour with organisational efficiency goals and demonstrating the value of proactive analytics in financial management.



Watch Andrew Ellison from YBS explain how Finfo's employee expense reporting helped Yorkshire Building Society reduce their staff mobile phone costs by 30% during the first year of our partnership.

Any Questions?

Book a personal introduction to our Automated Reporting Service via info@finfo.io