TOPIA

A TOPIA GUIDE

Getting to yes

Creating a compelling business case for distributed work technology

How to scope the need, cost it honestly, and win approval for the platform your global workforce already depends on.

01 Scope the need — **02** Build the case — **03** Present it

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The problem is rarely the product. It is the paperwork you have to write to buy it.

Mobility, business travel, and remote work have stopped being separate programs. They are one continuous question: who is working where, under what tax and immigration rules, and at what cost. Most teams already know they cannot answer that question at scale with spreadsheets, inboxes, and a patchwork of provider portals.

The hard part is internal. Budget owners in 2026 are triaging every software request against AI investment, vendor consolidation, and headcount plans. A request that arrives as a wish list gets deferred. A request that arrives as a costed, evidenced case with a named payback period gets a hearing.

This guide takes you from the first suspicion that manual processes are failing to a written case your CFO can approve. Work through it in order and you will finish with evidence, numbers, and answers to the objections you will actually hear.

Part 1

Scope the need

Evidence gathering: processes, hours, error rates, pain points.

Part 2

Build the case

Costs, savings, payback, and the cost of doing nothing.

Part 3

Present it

Tailored messages, the written document, the objections.

01

PART ONE

Scoping the need for investment

Before you ask for money, build the evidence. Nothing in Part 2 works without it.

Nine signals that manual work now costs more than software

Timing is the first question a leader will ask: why now. Tick the ones that apply to you.

01 Your team spends more hours on data entry than on assignees, travelers, or planning.

02 Program volume is growing faster than the headcount managing it.

03 Deadlines slip, documents carry errors, and nobody can say where a given employee is working today.

04 Tax, immigration, and posted worker rules keep changing, and each change costs you a manual audit.

05 You have had near misses on permanent establishment, payroll withholding, or right to work.

06 Employee complaints about assignment or travel handling are rising, not falling.

07 Morale in your own team is suffering because the work is clerical, not strategic.

08 New policies keep being written to patch complexity that a system should handle.

09 Your data is too scattered to be useful to anyone else. Finance cannot forecast mobility cost, and the AI tools your company is adopting have nothing clean to read.

Three or more? Your case is a timing case. Frame the ask as containing a risk that is already growing, not as buying a nice to have.

Laying the groundwork for a yes

A senior leader will not fund a vague problem. Before you name a vendor, name the work: which processes exist, who owns them, how long they take, and where they break.

01

Gather input from the people doing the work

Frontline coordinators see the gaps first. Ask what breaks, what gets redone, and what they dread, then group the answers into themes so the case rests on patterns rather than anecdotes.

02

Map the processes you actually run

List every process across mobility, travel, and remote work, with a named owner for each. The next page is a starting inventory. Be honest about the ones nobody owns.

03

Measure the hours

Track time per process daily for three months, six if volumes are seasonal. Hours are the raw material of your ROI number.

04

Name the biggest inefficiencies

Duplicate data entry, documents rebuilt from scratch, corrections to errors that manual input created. Rank them, and automate from the top of that list down.

A starting inventory of what your team runs

NO.	Global talent mobility	Travel and work location compliance	Remote and hybrid work
01	Cost estimates and budgeting	Pre-travel risk assessment	Work from anywhere risk assessment
02	Assignment management	Day tracking and location data	Request intake and approvals
03	Exception and policy management	Immigration and posted worker checks	Policy and regulatory compliance
04	Assignee engagement	Shadow payroll and withholding	Decision documentation and audit trail
05	Reporting to HR and finance	Threshold and exposure reporting	Reporting to legal and finance

Interview the owners, not just the process

FOR EACH PROCESS, RECORD

Owner
The named person, not the team.

Volume
How many times a year.

Hours
Average time per instance.

External spend
Fees paid to providers.

Worked example: one cost estimate, done manually

Map one process end to end and the case starts writing itself.

STEP 01	**Request the estimate** Email threads and calls to confirm scope, family size, and destination.	**1 to 2 days**
STEP 02	**Gather the data** Export from the HRIS, rekey compensation and dependents by hand.	**2 to 4 hours**
STEP 03	**Build the estimate** Custom spreadsheet, plus provider figures for cost of living, tax, and premiums.	**3 to 10 days**
STEP 04	**Review and revise** Manual edits, version confusion, each revision billed again.	**2 to 5 days**
STEP 05	**Approve and file** Sign off by email, upload to the employee record by hand.	**1 day**
STEP 06	**Track against actuals** A parallel spreadsheet nobody updates after month three.	**Ongoing**

6 steps
one estimate

Multiply by your annual volume, add the provider fee per estimate and per revision, and you have the first hard number in your business case.

Turn the hours into a shortlist

Once you can see where the hours go, the duplication is obvious. The same employee data typed into three systems. Documents rebuilt from scratch each quarter. Time spent correcting errors that only exist because a person retyped a number. Four questions turn that picture into an automation shortlist.

Q1

Which processes take the most time?

Rank by annual hours, not by how annoying they feel.

Q2

Which are most prone to error?

Errors with a compliance consequence outrank everything else.

Q3

Which do people dread?

Dread predicts attrition, and attrition is a cost finance understands.

Q4

Which are purely repetitive?

Rules-based, high volume, low judgment. Automate these first.

ONE MORE QUESTION FOR 2026

Which of these processes could an AI assistant handle today, and what is stopping it? The answer is almost always the same: the data is trapped in spreadsheets, inboxes, and provider PDFs. Clean, structured mobility data is the prerequisite for every AI initiative your company has planned, and that argument travels well outside your function.

Set objectives you can be measured against

Vague goals invite vague funding. Commit to three or four objectives that solve a named business problem, each with a baseline you have already measured.

Operational efficiency

Cut the hours spent on the top three manual processes, and shorten turnaround from days to hours.

Compliance confidence

Know where every employee is working, and flag tax, immigration, and posted worker thresholds before they are crossed rather than after.

Employee experience

Give assignees, travelers, and remote workers self-serve answers and visible status, instead of an inbox queue.

Data and security readiness

Hold sensitive mobility data in one governed system with clear residency, retention, and access controls, ready for audit and for AI initiatives.

Write each objective as a sentence with a number in it. "Reduce cost estimate turnaround from nine days to one" is an objective. "Improve efficiency" is a hope.

Metrics to baseline now and report on later

Capture these before implementation starts. A baseline you gathered yourself is the most persuasive evidence you will ever have.

PEOPLE

- Assignee, traveler, and remote worker satisfaction
- Team productivity and workload balance
- Hours lost to repetitive manual tasks
- Time to onboard someone in a new country
- Retention of assignees and of your own team

PROCESS

- Turnaround time per key process
- Volume handled per person per quarter
- Error and rework rate on cost estimates
- Threshold breaches and near misses
- Response time to a work location request

TECHNOLOGY

- Uptime and reliability
- Scalability as volumes grow
- Integration effort with your HRIS and payroll
- Security, data residency, and AI governance posture
- Total cost of ownership

PICK FIVE, NOT TWENTY

One metric per objective, plus one for cost. A short scorecard you report every quarter beats a dashboard nobody opens.

02

PART TWO

Building your business case

Turning your evidence into a number a CFO will accept, including the cost of standing still.

Justifying the cost in a scrutinized budget cycle

Software budgets are tighter and more contested than they were three years ago. Your request sits alongside AI pilots, security spend, and a consolidation mandate. That is survivable, because your case has something most requests lack: a documented baseline and a measurable payback.

Lead with the comparison, not the price. The relevant number is not what the platform costs. It is the difference between what you spend now, in hours, provider fees, and exposure, and what you would spend after.

Frame it as

A cost shift

Money already leaving the business through provider fees and rework, redirected into a system you own.

Not as

A new line item

A fresh cost with no offset is the easiest thing in the world for a budget owner to defer.

Always include

The cost of saying no

Growing provider spend, rising exposure, and the hires you will otherwise need.

SAY THIS EARLY

"We are spending this money already. It is just spread across provider invoices, overtime, and the fines we have not been issued yet."

Both sides of the ledger

A perfect ROI figure does not exist in this category. A transparent one does. Show your work, mark your assumptions, and put a range on anything you cannot pin down.

Costs, direct and indirect

- Implementation fees and ongoing subscription
- Configuration, integration, and data migration
- Training and enablement time
- Maintenance, support, and internal ownership
- Temporary productivity dip during rollout
- Security and privacy review effort
- Opportunity cost of not funding something else

Savings and gains

- Hours returned by automating repetitive work
- Provider fees avoided on estimates and revisions
- Penalties and interest avoided through earlier detection
- Rework avoided by removing duplicate data entry
- Faster decisions, so business plans are not held up
- Retention of high performers who wanted the move
- Headcount you no longer need to add to keep up

Payback point

Name the month the benefits overtake the costs. A dated answer beats a percentage.

Intangibles, listed separately

Assignee experience, employer brand, audit readiness. Real, but keep them out of the arithmetic.

A four-step ROI you can defend in the room

01

Price today's process

Annual hours per process, multiplied by a loaded hourly rate, plus every provider invoice attached to that process.

02

Estimate the same process automated

Use vendor benchmarks, but discount them. A conservative figure you can defend is worth more than an optimistic one you cannot.

03

Add the risk line

Take your near misses from the last two years. Ask tax and legal what each would have cost if it had landed, then apply a probability. Even a cautious number reframes the conversation.

04

Model three years, not one

Year one carries the implementation cost. Years two and three are where the compounding shows. Present a low, expected, and high case.

THE SENTENCE TO LAND

"Here is what the current process costs us, here is what it costs automated, and here is the month the difference pays for the platform."

03

PART THREE

Presenting it to stakeholders

The same case, told six ways, plus answers to the objections you will actually hear.

What each function needs to hear

One case, six translations. Lead each conversation with the risk that function owns.

Finance

Payback and forecast. When it becomes cost neutral, and how mobility cost becomes predictable.

Exposure. Penalties, interest, and back payroll avoided by catching thresholds early.

Budget fit. How the phasing lands inside the current plan.

Procurement

Value and consolidation. Which existing contracts and provider fees this replaces.

Vendor viability. References, financial stability, roadmap, support model.

Terms. Service levels, exit and data portability, price protection on renewal.

IT

Integration. How it connects to the HRIS, payroll, travel, and expense systems.

Security and residency. Where personal data lives, who can reach it, how long it is kept.

AI governance. Whether the vendor's AI features are auditable and what data trains them.

Effort. What IT is actually being asked to build and maintain.

Human resources

Employee experience. What changes for assignees, travelers, and the team supporting them.

Change management. Training load, rollout sequence, and who champions it locally.

Talent strategy. How faster, cleaner mobility supports internal moves and skills-based deployment.

Legal, risk, and compliance

Risk mitigation. Permanent establishment, right to work, posted worker, and withholding exposure.

Evidence. A defensible audit trail for every work location decision the company makes.

Data privacy. Lawful basis, cross-border transfer, and retention for location data.

Executive leadership

Strategic fit. How this supports growth into new markets and flexible work commitments.

Speed. Getting the right people into the right market in weeks rather than quarters.

Risk and reward. The upside, and the headline risk of getting cross-border compliance wrong.

BEFORE THE MEETING

Brief each stakeholder individually first. A decision meeting is a place to confirm agreement, not to discover objections for the first time.

Ten elements of a business case that lands

Aim for eight pages. If a section cannot earn its place, move it to an appendix.

01 Executive summary

One page: the problem, the recommendation, the cost, the payback, the ask. Assume some readers stop here.

02 Problem statement

The inefficiency, with the evidence from Part 1 attached, tied to a company priority.

03 Objectives

Three or four measurable outcomes, each with the baseline you recorded.

04 Options considered

Include do nothing, hire, outsource, and build in-house. Showing your work builds trust.

05 Recommended solution

Why this one, mapped feature by feature to the processes you ranked as most in need.

06 Implementation plan

Timeline, milestones, owners, and the change plan. Name who from IT, HR, and procurement is needed and when.

07 Financial analysis

The full cost-benefit view over three years, in low, expected, and high cases. This section gets read the closest.

08 Risk assessment

Implementation risks and mitigations, and the risks of not proceeding. Name the compliance exposure plainly.

09 Assumptions and dependencies

What has to stay true for the plan to hold: team availability, HRIS data quality, integration windows.

10 Recommendation and ask

One paragraph, one number, one date. State exactly what you want approved and by when.

Five objections, and how to answer them

OBJECTION 01

"Why can't we keep doing this in spreadsheets?"

We have outgrown them. Five specific things break at our current volume:

- **No shared truth.** Parallel versions, and no way to know which is current.
- **Lost threads.** Decisions live in inboxes, so deadlines slip quietly.
- **No workflow.** Nothing chases an approval or flags a stalled case.
- **No reporting.** We cannot answer "where is everyone working" in under a week.
- **Security and privacy.** Sensitive personal data sits in files we cannot govern, audit, or delete on request.

OBJECTION 02

"We don't have the budget."

We have costed both sides. Factoring in current third-party spend, we estimate a reduction of approximately X percent and break even within Y months. We can phase the rollout over Z months to spread the cost across budget periods.

We have also costed the alternative. Staying manual means provider fees that rise with volume, more overtime, and compliance exposure that grows every quarter. Deferring the decision does not remove the cost. It just moves it somewhere less visible.

OBJECTION 03

"Let's just hire another person."

Adding people to an inefficient process scales the inefficiency. Recruitment, salary, benefits, and onboarding recur every year and rise with inflation, while a platform cost is predictable and flat as volumes grow.

The stronger argument is what the current team could be doing instead. We would rather move experienced people off data entry and onto policy design, cost planning, and the complex cases that genuinely need judgment.

OBJECTION 04

"Let's outsource it."

Outsourcing moves the work, not the cost. Every cost estimate carries a fee, every revision carries another, and turnaround stretches from hours to days. Those charges scale with our program, so the more we grow, the more we pay.

We also lose the data. When our records live in a provider's system, we cannot report on our own program or answer a question quickly. The better split is to automate the repeatable work in a platform we own, and spend the consultancy budget on genuinely complex advice.

KEEP THE TEAM ON THE WORK THAT NEEDS JUDGMENT

OBJECTION 05

"Can't AI or our HRIS already do this?"

This is the 2026 version of the budget objection, and it deserves a serious answer rather than a defensive one. Our HRIS is the system of record for employment. It does not hold day counts, treaty positions, immigration status, or assignment cost, and it was never designed to.

AI assistants are only as good as the data underneath them. Ask one where our people are working today and it will read the same scattered spreadsheets and provider PDFs we do. Worse, a confident wrong answer about a tax threshold is a liability, not a saving.

What we are proposing is the layer that makes AI useful here: governed, structured, current mobility data, with the rules engine and audit trail that a regulator will accept. It is a prerequisite for the AI roadmap, not a competitor to it.

BEFORE YOU WALK IN

- **Know your three numbers.** Annual hours, current provider spend, and payback month.
- **Name the alternative.** Show you considered hiring, outsourcing, and doing nothing.
- **Bring one story.** A near miss, with what it would have cost.
- **Ask for a decision.** A specific approval, with a date.

BRIEF INDIVIDUALLY, DECIDE TOGETHER

The evidence is the argument

Distributed work is not a phase anyone is waiting out. People will keep moving across borders, and the rules governing those moves will keep tightening. Managing that on spreadsheets is not a cost saving. It is a deferred bill.

What turns a request into an approval is not enthusiasm. It is a documented baseline, an honest ledger, a payback date, and a version of the story that speaks to each person in the room. You now have all four.

Start with one process. Map it, time it, price it. That single worked example is usually enough to change the conversation from whether to invest to when.

This week

Pick one process

The one your team dreads most. Map its steps and name its owner.

This quarter

Measure the hours

Track time and provider fees against it, so the baseline is yours.

Next budget cycle

Bring the ask

One page, one number, one date. Ask for a decision.

TOPIA

About Topia

Topia is the global leader in workforce mobility technology, helping organizations of all sizes manage every dimension of employee movement, compliantly, efficiently, and at scale.

Topia's Horizon platform brings together agentic AI, policy intelligence, and end-to-end program management to give mobility teams the tools they've always deserved. Trusted by some of the world's most complex global organizations, Topia combines deep domain expertise in tax, immigration, and global HR with modern technology built for the way work actually happens today. Learn more at topia.com.

Plan

Cost estimates and scenario modeling in minutes.

Track

Work location and day count data you can rely on.

Comply

Tax, immigration, and policy thresholds flagged early.

Want help building your numbers?

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