

# Customer Success Story – Contract Management Solution

## About the Client:

A professional services firm based in the Northeast, with offices nationwide.

## Background and Challenge:

The organization received many signed contracts and needed a way to approve and process them for invoicing. Previously it took numerous employees to process and extract information from these contracts to populate their invoicing system, leaving plenty of room for human errors. There was also no visibility or reporting into the contract process. The organization investigated utilizing various commercial off-the-shelf software, but they wanted an easy way to modify the tools to meet their organizational needs. The organization was an early adopter of Microsoft 365, so they explored the options available using Artificial Intelligence and process automation to reduce human errors.

## Solution:

Withum worked with IT, Legal, Procurement, and Finance stakeholders to ensure that the system would include all phases of the contracting process from initial submission through execution and closeout and be useful for departmental users and contract administrators. We built the solution utilizing Microsoft SharePoint Premium (formerly Syntex) to process signed contracts and extract relevant information and key data. Power Automate made it easy to streamline approvals and populate Line of Business applications for invoicing. Withum also provided support during user acceptance testing, change management, and training for the product owner and IT team.

## Benefits/Results:

The new system immediately got high marks from contract administrators for usability and powerful search and filtering capabilities. New visibility into vendor history and related contracts offered fresh insights, enabling better decision-making and more proactive management of the contracting process. The PMO office is looking forward to extending the functionality of the application to better manage the client/vendor relationship and the company's overall portfolio to gain better insight into daily operations.

