



Get Results - Get Upside Software

Case Study: US Defense Company

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Client Overview

The client is a technology and innovation leader specializing in defense, homeland security and other government markets throughout the world.

The Business Challenge

The primary challenge for this client was to manage a procurement package of related documents (very common in Government contracting) and have a single point of entry for the data to avoid data re-entry for each document. A large number of packages were in progress at any given time as all business units utilized this model. Performance related to user experience was very important and documents needed to be produced in near real-time to support the client's business model.

One of the key challenges was to develop a process where there was a single point of entry for the information that gets imbedded in multiple documents. The client's process before the Upside implementation involved a lot of redundancy. In keeping with this single point of entry approach it was also desired that the documents would not need to be individually manipulated unless specific changes needed to be made to the document.

The final key challenge was to provide a mechanism where an auditor could inspect all the documentation associated with certain purchase orders, without having visibility to all purchase orders.

The Solution

The stages of the client's procurement package were broken down into logical phases in order to facilitate the client's business model. Each phase was set up to gather the necessary information through UpsideForms and the data collected was used to generate the necessary documents for the next phase in the sequence.

The first phase collected data from the RFX (Request For Proposal / Request For Information) selection process, which could involve multiple suppliers. Each supplier requires certain documents to be created with supplier specific information. This was achieved by creating subgroups of documents associated with each supplier plus common documents available to all suppliers in the procurement package. The data was then migrated via the contract workflow process into contract based User Defined Fields (UDFs) that are mapped to generate the required documents. Each document generated creates a contract record which is tied to the package via a parent / child hierarchy.

Source selection is captured in phase two of the procurement package via an UpsideForm and the data is migrated via the contract workflow process into contract based UDFs. The form contains a number of fields that are mapped to generate the required documents for the package. The form also denotes who the selected supplier is from phase one and all generated documents from this workflow step are created for the selected supplier.

Company Name

US Defense Company

Industry Type

Defense / Manufacturer

Business Challenge

- Need to manage a procurement package of related documents.
- Have a single point of entry for data to avoid data re-entry for each document.
- Many packages are in progress at any given time and need to be produced in near real-time to support their business model.
- Provide means for an auditor to inspect all documentation associated with specific purchase orders without having visibility to all purchase orders.

The Solution *continued* . . .

The purchase order is created in phase three of the procurement package via an UpsideForm. The system creates a project record and attaches it to all child records in the package that have the same contractor name. The contractor is also replaced on all the common documents with the selected supplier and the project is attached to all associated contracts. In order to provide auditing capabilities, the system builds an organization unit to which the auditor is given access to when they are ready to review the package. The auditor has access to all documents tied to the purchase order but does not have access to any purchase orders belonging to other departments.

Once the purchase order creation process is complete, the system automatically creates final PDFs of all the documents in the package. A copy of each of these documents is placed in the document folder structure associated with the package, according to a predetermined filing plan. This allows all the documents for the entire package to be easily accessible from a single location.

The final phase is when the package is routed for approvals as required by the individual contract managers approval limits. The package is then routed to a compliance officer who utilizes another UpsideForm to score the package's documentation. If the package is in compliance, all documents are marked as fully executed and the workflow is complete. Non compliance causes the system to return the package to the contract manager for correction and resubmission.

The Top Business Benefits

- A superior and industry leading CMS (Contract Management System) product that is fully supported.
- Best in class contract management that reduces duplication of data entry and increases efficiency in procurement package creation.
- A streamlined and automated procurement process with performance and speed as driving factors.
- Ability to provide instantaneous reports that offer a significant advantage in improving the organization's effectiveness on a real time basis.

The Return on Investment

Since implementing the Upside Software suite the client has reported a reduction in cycle times of at least 10 days on average. Prior to the Upside implementation, packages were rejected by compliance officers 2 – 3 times on average due to inconsistencies in documentation across the package, missing documents and incorrect filing of documentation. The Upside implementation has helped the client reduce errors drastically and streamline their entire process allowing them to respond quicker to Government and other tenders as well as ensure a much faster sales cycle.

What's Next?

The client is currently planning another business unit rollout with another four business units to be phased in over the next two years. Eventually all contracting done by this global organization will be handled through the Upside Software suite of products, managing several billions of dollars in agreements.

Strategy

- Implement Upside Software Suite including UpsideContract and UpsideForms.
- Establish one contract type to represent each package.
- Collect necessary data in a series of attached UpsideForms.
- Use workflow to represent collection points that trigger the system to generate the required documents automatically as independent (related) contracts.
- Utilize the workflow to print and migrate copies of all finished documents into the package's folder structure.

Interested in UpsideContract?

We'd love to hear from you.

For more details please contact your Upside representative at insidesales@upsidesoft.com

Corporate Headquarters
Upside Software Inc.
Suite 310, Manulife Place
10180 - 101 Street
Edmonton, AB T5J 3S4
Canada

Email: ask@upsidesoft.com
Phone: +1 (780) 702-1432
Fax: +1 (780) 702-1438
For more information,
please visit www.upsidesoft.com



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