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# Case Study: Global Telecommunications Company

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## Client Overview

The client is a global telecommunications company reaching North America, EMEA, ASIAPAC and Latin America.

## The Business Challenge

The primary challenge was to automate and consolidate the client's contracts globally. Prior to the implementation of UpsideContract the client had approximately 6,000 legacy contracts, of which 5,000 were hard copies. These contracts needed to be imported into UpsideContract along with their associated metadata.

The client was also concerned about revenue loss due to inadequate controls or knowledge of pricing levels used for customer purchases. There were discrepancies between prices listed on the contract and the actual prices paid by the customer. UpsideContract & UpsideForms were to be used in concert with SAP to track revenues and identify inaccuracies and variances.

A team methodology is utilized by the client for the lifecycle of their contracts. From contract conception to completion, teams including legal, financial, business and technical personnel are involved in the contract lifecycle. A workflow needed to be developed that would support this methodology and reduce duplication of efforts.

Finally, the client wanted to track user compliance with regard to how the contracts were passing through their business process. It was important to track the timeline of steps involved and identify any bottlenecks internally or externally.

## The Solution

The deployment strategy was to perform a pilot deployment where contracts for a specific group of clients were supported in a particular region. This allowed the client to get into production quicker and then analyze the effectiveness of the system on their day-to-day processes. Once the pilot phase was complete, Upside worked with the client to analyze the implementation and make changes where required to increase efficiency and promote a better understanding between team groups.

Legacy contracts were scanned and imported into UpsideContract. They were reviewed and predetermined metadata that was common in each contract type was manually entered into the application. A scanned copy of each legacy contract was attached to the contract created in the application to create a cross reference.

## Company Name

Global Telecommunications Company

## Industry Type

Telecommunications

## Business Challenge

- Automate and consolidate contracts globally.
- Import legacy contracts into UpsideContract.
- Utilize UpsideContract and UpsideForms in conjunction with SAP to better manage revenue knowledge and controls.
- Design a workflow that supports the client's team methodology contract lifecycles.
- Increase awareness between legal personnel to reduce duplication in legal review processes.
- Track user compliance as contracts pass through their business process to identify bottlenecks internally / externally.

## The Solution *continued* . . .

In order to facilitate the team member methodology for working contracts from conception to final approval, the workflow was designed to allow for the gathering and setup of team members. Team members were grouped based on their departments and job responsibilities. Steps were created for financial approvers to complete their approvals and ensure the required documentation was attached to the contract. Alerts were used to notify team members when actions were required to meet deliverables, thereby creating an audit trail of completion for the contract deliverables.

UpsideContract was used to upload pricing details required for the client's contracts. This pricing information was then used for comparisons between the purchase ordering system to track pricing irregularities and identify variances.

A report was configured in UpsideContract to filter out the contracts that met the specific criteria entered. Using the filtered results, the client was able to create a summary of the specific clauses they were looking for. UpsideContract's functionality to classify clauses was used to identify the specific clauses the client was looking for and compare them among several contracts in the summary. The legal team was able to compare text used in clauses and standardize clause types for use over several contracts. This reduced the amount of changes required for specific clauses over time.

Business intelligence reporting was used to measure the efficiency of contracts moving through the workflow. Upside created extracts for the client that identified the time it took for each workflow step, including the time a user received and completed the task. This allowed for reporting on task completion and the client was able to see where there were deficiencies in their processes.

## The Top Business Benefits

- A superior and industry leading CMS (Contract Management System) product that is fully supported.
- A CMS product that features advanced template legal clause maintenance and clause level tracking on individual agreements.
- A CMS product that can export data for use in various applications (including other software programs).
- The ability to import & interface data from other sources (seamless integration).
- Best-in-class contract management including reduced data-entry and duplication as well as fast, efficient and accurate reporting.
- Ability to provide instantaneous reports that offer a significant advantage in improving the organization's effectiveness on a real time basis.

## Strategy

- Implement Upside Software Suite including UpsideContract and UpsideForms.
- A pilot deployment was used to analyze the day-to-day effectiveness of the system in one region.
- Results from the pilot project were analyzed and changes were made where required to optimize efficiency.
- Legacy contract conversion of soft and hard copies of existing contracts.
- A workflow was created to facilitate team methodology from contract conception to post-completion evaluation.
- UpsideContract used to load pricing details and track variances and irregularities.
- Clause analysis reporting was used to filter contracts based on specific criteria.
- Business intelligence reporting was used to track the compliance of contract approval workflow.

## The Return on Investment

Significant savings will be made on the legal review time of contracts being created (estimates show a reduction of at least 30% from the current time taken in review). Use of standard language and 'pre-approved' alternatives will allow the client a drastic reduction in effort by their legal team.

Accuracy and reporting of contract data will be improved as well. The ability to centrally locate all legacy contracts and report on the data will save time. It is anticipated that the Upside Software Suite will help the client reduce over 30% of their total contract cycle time and as there's increased usage and adoption, this percentage grows even more.

In addition, the organization's compliance with Sarbanes-Oxley (SOX) has been strongly enhanced with the implementation of the Upside Software suite and additional ROI has been attained through more streamlined auditing and reporting.

## What's Next?

Using the information gathered by UpsideContract & UpsideForms and the analytical and business intelligence tools it incorporates, the client is now able to do more complex analysis to troubleshoot their internal processes not only in contract management but within other departments as well. The client plans to use these tools to ensure their business processes are operating as efficiently as possible.

## Interested in UpsideContract?

We'd love to hear from you.

For more details please contact your Upside representative at [insidesales@upsidesoft.com](mailto:insidesales@upsidesoft.com)

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