

Ecteon's Contraxx Manages Behavioral Science Technology's Policies and Workflow, Improving Departmental Efficiencies and Client Service

Situation

Behavioral Science Technology, Inc. (BST) provides workplace safety consulting services across the globe. Acquired by DEKRA SE in March of 2012, BST helps organizations reduce workplace injuries and achieve world class safety performance that supports operational excellence.

In 2008, BST's legal team worked in Texas and California without a central infrastructure for creating, storing, and managing in-life contracts. With no centralization of information to support the activities of BST's legal department, everyone worked separately, using spreadsheets and emails—attempting to sync day-to-day activities and keep record of contract changes. As a result, BST couldn't ensure consistency between negotiated contracts and few knew how those contract provisions had performed or when contracts were up for renewal and expiration, putting the company at risk and renewal disadvantage with clients and vendors. "For each engagement our clients were receiving new contracts with new terms and conditions and no one knew exactly what they had signed last time," said Joannie Morgan, director of legal operations at BST. At the end of the day, nobody knew the current status of contracts and frequent manual contract creation was time consuming and sometimes confusing to clients.

BST knew it was time to look for a solution. Morgan's team identified system requirements, starting with "must have" features and ending with "awesome to have" features. After researching the products available, Ecteon's Contraxx stood out from the competition. "Contraxx was ideal for our needs because it didn't force us to accept something pre-packaged or what someone else had or thought we needed," noted Morgan. "We could configure it the way we wanted it to work—in a way that aligned with our workflows," she continued. Ultimately, the system offered a holistic picture of day-to-day activities that Morgan was looking for and the business needed for maximum efficiencies.

Solution

Ecteon met with BST to understand their contract management needs. The Ecteon team spent three days on-site helping Morgan's project team get focused and understand how to gain control of their contracts. "Ecteon gave us best practice guidance and a starting point to work from," said Morgan. The system was configured based on how BST needed to supported its internal and external clients. With an aggressive timeline target, starting with configuration and system training, Ecteon rolled up its sleeves and helped the BST team build the foundation that would enable them to complete their initial implementation in just 4 months.

During implementation, the Ecteon team guided BST users on proper use of the system. "It made all the difference in our ability to roll out the new system as quickly as we did," said Morgan. She also noted, "Ecteon was very adaptable to their working processes." For example, BST needed to link requests made in the system in order to improve visibility of contract progress—and Ecteon delivered. Now, BST teams can see from start to finish, all the activities that occurred with an agreement and who executed those activities. This holistic picture "was critical to taking the system to the next level and BST ended up doing a complete restructuring of the language and contract repository" to take advantage of this critically important feature, noted Morgan.

Today, BST manages non-disclosure agreements, services agreements, contractor agreements, vendor contracts and partner agreements in Contraxx. Approximately six full-time employees use Contraxx. The system not only manages contracts, but it also serves as a hub for managing requests for legal support from BST and its affiliate companies of the DEKRA Insight Service unit as well as managing BST's intellectual property program, which includes registration and maintenance of trademarks. This flexibility and integration allows BST to set up "templates," which are data structures that track ancillary contracting activities.

Customer Profile

Behavioral Science Technology, Inc. (BST) provides workplace safety consulting services across the globe.

Business Situation

BST needed a centralized contract management system that could align and improve compliance with their company contracting business processes and workflow.

Solution

BST chose Ecteon's Contraxx, a browser-based, contract lifecycle management (CLM) solution that was designed to work with their team's internal workflows and management processes.

Benefits

- Increased efficiency—closed 36 percent more requests in 2016 than were closed in 2009; close request time reduced by two days
- Improved communication
- Quality client service

Additionally, BST's Contraxx solution serves as a model for its North American affiliate companies, which are now exploring ways to implement it in their business environments. "Contraxx has been invaluable in enabling us to support the business and is worth everything we've invested in it and more," said Morgan.

Benefits

Increased Efficiency

Embedded workflow processes reduce business risks and exposures. Fingertip access to contract terms and data supports quick, accurate determinations of potential risks, rights, obligations and actions. Utilizing Contraxx, the legal department can track and review specific metrics that enable staff to assess performance and evaluate areas of improvements. For example, metrics from Contraxx indicate the legal team closed 36 percent more requests in 2016 than were closed during 2009 (the first year of Contraxx implementation) and the team did so with no increase in headcount.

Similarly, year over year performance indicators show it took an average of five days to close requests in 2015 whereas the amount of time required to close requests in 2016 was reduced to an average of three days. Through further analysis, BST was able to determine the performance improvement directly relates to the number of requests and resource skills required for handling each request – data they could not assess without metrics captured by Contraxx.

Improved Communication

BST is able to look at its activities in the system and see the exact journey a contract took from start to finish. As a result, when internal or external clients have questions about an agreement, it is simple to respond quickly to their inquiries because of the available data stored in the system.

BST utilizes system notifications to ensure "downstream" activities are initiated as soon as the contract is entered into the system; no need for an employee to send notifications that the next action in the process can begin.

Quality Client Service

With a track record of client contracts, scope of work and order history in Contraxx, incoming BST sales representatives can glean history of a new account easily. Having new client data readily available to new sales staff helps them better serve the client by knowing their history and interactions, and lets the client know their needs are met and understood.

What's Next?

BST's infrastructure is serving as a model for its North American affiliate companies. BST is currently working with these affiliates to share how their Contraxx solution works and explain how Contraxx could work to address specific issues within these other companies. DEKRA SE and these affiliate companies are taking notice of the results achieved by BST from its investment in Contraxx and, as a result, are taking action to capitalize on what BST has done and expand it into their individual environments.

Conclusion

Investing in Contraxx wasn't just a new system project implementation for BST, it was the start of a long-term commitment to improve its contract management function and best practices in support of the business. From a management standpoint, Contraxx's feature-rich functionality and flexible nature allowed BST's legal team to not only show the work they're doing, but put metrics behind it so leadership understands how the legal team's performance is growing with the business and how the legal team is contributing to the overall success of the business. "Contraxx lets you marry your vision with functionality in order to develop a system that works with the policy infrastructure of our organization," said Morgan. "It's a resource that's always there—an 'employee' that never sleeps and ensures you stay on track," she continued. Putting Contraxx in place allowed BST's team to focus on managing client support, rather than spending time and energy tracking down paperwork.

Overall, BST was extremely satisfied with the initial implementation, timeline adherence and customer service delivered by Ecteon. "Everyone we've encountered within the organization exhibits outstanding customer service and they treat you like you are the only person they're doing work for," concluded Morgan.