

# Results exceeded enterprise-level objectives to improve large-scale and complex contracting scenarios for a multi-state, non-profit organization providing dental healthcare benefits and member services for providers

Ecteon’s customer manages an exceptionally large number of contracts, but lacked a centralized standard mechanism for management of those contracts, visibility into data embedded in the contracts, and commitments and deadlines associated with the contracts. The overall, general categories of contract types were Insurance Group contracts, including Vision, Dental and combined; Vendor/Supply contracts; Provider contracts; and Agent/Agency contracts.

The nature of this customer’s business necessitates annual and off-cycle updates which impact all contracts of selected types. Visibility into those contracts was limited, and ability to generate and apply amendments or other updates was non-existent resulting in time-consuming and expensive manual efforts. Also the customer needed a mechanism to provide for language customization across contracts of various types, and to manage provisions in a standard fashion that facilitated ease of reporting.

**Project challenges included:**

- Complexity of existing data migration into the Contraxx environment
- Complexity of the Provision Library and initial seeding of the Library
- Complexity of data elements and contract types, and the need to standardize data across contract types
- Complexity of reporting
- Commitment to business process changes as Contraxx was being implemented

**Stated objectives:**

- Transition contract management practices across the enterprise to a centralized, structured, secure system in order to reduce the risk and time associated with performing key contracting tasks manually.
- Automate the contracting workflows by sending proactive email alerts when tasks require attention, providing a dashboard display of open tasks, and managing exceptions.
- Provide a reporting framework to assist management in analyzing provision-level trends and performance, turnaround time, and other key contract metrics.
- Provide visibility to management and end users on the status of the contract request.
- Integrate with other enterprise information systems to eliminate the need to re-key contract related information.



**CUSTOMER PROFILE**

Multi-state, non-profit organization providing dental healthcare benefits and member services for providers.

**BUSINESS SITUATION**

Exceptionally large number of contracts lacking a centralized standard mechanism for that management or visibility into data embedded in the contracts, commitments and deadlines associated with the contracts.

**BENEFITS**

- Creation of a centralized, structured, secure system through which contracting, and contract related activities can be effectively managed across all product types
- Workflows fully automated so that tasks are identified quickly, responsible parties notified immediately, and identification of open items is available for managers to improve throughput overall.
- Reporting of provision-level trends and usage is now available, supporting identification of custom language and the need for Clause updates.
- Requesters and other users have visibility into the process for their contracts, including current status. Breaches of SLAs are easily identifiable to ensure consistent throughput.

Ecteon was chosen as a business partner to tackle their challenges with Ecteon's Contraxx software solution because the customer previously used another contracting solution to draft their agreements which had major shortcomings. The customer recognized that Ecteon's Contraxx meets enterprise needs and addresses complex contracting scenarios. Specifically, the customer saw that Ecteon's strategic and implementation teams were able use Contraxx to draft their contracts, provision library, and meet and even exceed the customer's stated objectives.

Ecteon worked closely with the customer to fully describe and document system requirements and approach. Upon acceptance of requirements, Ecteon began configuration and development of the Contraxx solution, holding regularly scheduled walkthroughs to discuss progress, brainstorm User Interface (UI) approaches, and identify potential risks and concerns in a timely fashion. During the project, Ecteon held weekly project status meetings, with written reports of status against plan, with potential slippage identified and addressed. Ecteon collaborated well with the customer to develop and scrub contract data, documents, and provision migration details. Ecteon developed and executed System Test Cases plus provided full time support and response during User Acceptance Testing. During and after deployment, Ecteon provided full time ongoing support as Contraxx was rolled out to the user community, and responded quickly and effectively to identified issues.

One challenge solved included migration of both contracts and provisions being more complex than anticipated. This required multiple iterations of updates to the spreadsheets in which this material was captured. Ecteon provided ongoing support and staffing to help scrub this content and, in some cases, provide scripting to clean and normalize data prior to migration.

Another challenge met: functional complexity was also greater than anticipated, especially in regard to management of clauses at the contract level. As these requirements were uncovered during testing, Ecteon brought additional resources onto the project to ensure that deadlines were met and User Acceptance Testing (UAT) issues were resolved.

Extremely satisfied with Ecteon and the system developed with Contraxx the customer engaged with Ecteon after the initial project finished. Multiple large enhancement projects were then completed to extend business function capabilities after the original "go live" launch. Some of the sets of requirements in the additional enhancement projects were even more complex than the initial deployment. Currently, the system can be altered and enhanced to a great degree without engagement with Ecteon, which allows for inexpensive enhancement and improvement.

#### Major benefits include:

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The post-production support experience from Ecteon's Customer Support Team provided short term support immediately post go live and was highly hands on. The transition to Ecteon's Help Desk organization was smoothly and clearly handled. High priority and critical issues are promptly resolved, with reasonable response to non-critical items.

#### Ecteon implemented special features of Contraxx, which allowed client's objectives to be achieved and/or exceeded, including:

- Support for non-contract requests including credentialing, Agent/Agency management, and specialized termination processing was provided and integrated into the contracting process
- Contraxx's powerful Provision Library capabilities provided for exemplary control of contract language, identification of exception clauses, and containment of customer risk and exposure over time
- Visibility into contract data through reporting and management of contracting processes for operational purposes increased productivity and identified sticking points in business processes
- Contract throughput and staff efficiencies improved dramatically due to extensive use of user-specific Dashboards and Alerts
- Extensive tailoring for Document Packages and multiple Benefit Packages per contract (e.g. Benefit Package Level definition of Clauses; Benefit Package Level capture of data; Benefit Package Level generation and management of documents and drafts)

**About Ecteon:** Celebrating over 30 years in business, Ecteon recognizes that contract management is a complex function for most organizations and departments, large or small. Their extensive expertise and knowledge across multiple industries Ecteon helps clients optimize their contract management systems. Ecteon's experience provides unique insights that enable customers to effectively and reliably manage their entire contract lifecycle. Offering outstanding CLM services Ecteon excels at their work with notable financial, entertainment and corporate businesses in the US and around the globe. For more information, visit [www.ecteon.com](http://www.ecteon.com).