

## Client Overview

The client is the government of a large municipality engaged in the procurement and contracting processes of several services within the municipality.

## The Business Challenge

The client did not have an electronic data collection system in place and was facing challenges in tracking key contract data. Due to a lack of auditing capabilities, reporting was also a key challenge that resulted in missed opportunities.

It was essential for the client's existing procurement process to be more transparent to ensure that the process was open and fair. It was also important to establish a clear method of how procurements were executed across the organization.

An ineffective workflow left the client without adequate notifications of key contract milestones and missed action items. Stakeholders were not as involved in the contract lifecycle as they needed to be and time sensitive processes were not being completed on time.

## The Solution

UpsideContract, UpsideRFX and UpsideForms were all implemented in conjunction in order to establish a centralized, searchable data repository and provide a defined data structure. This provided the framework needed to address all of the client's business challenges. The built-in auditing capabilities of the Upside product suite provided essential auditing capabilities for all of the client's transactions and ensured their data was traceable. This in turn provided vital data needed for reports that not only informed the client of the various stages of the contract lifecycle, but also helped identify bottlenecks in the process.

An open, fair and transparent procurement process was established that ensured all transactional data was traceable and could be stored for at least 7 years. The application was configured to deliver a standard procurement process across the organization, and client specific forms were created to streamline the data capture process and ensure data integrity.

A comprehensive workflow, governed by predetermined business rules, was configured to increase visibility throughout the contract lifecycle for all stakeholders. Notifications were set up to alert stakeholders of all action items and key contract milestones. Time sensitive rules were also established to ensure records meeting specified criteria were automatically locked as required.

## Company Name

Municipal Government

## Industry Type

Public Sector

## Business Challenge

- The client did not have an electronic data collection system in place and their transactional information could not be easily accessed.
- Auditing and reporting capabilities were needed for all client transactions.
- The existing procurement process lacked transparency and resulted in unclear procurement execution methods.
- Task owners were missing key workflow events and there were several bottlenecks in the contract lifecycle.
- A time sensitive rules-based system was needed to ensure necessary actions were taken based on specified criteria.

## The Top Business Benefits

- Best in class contract management that reduces duplication of data entry means increased efficiency in procurement package creation and decreased cost and resource expenditures.
- The ability to provide instantaneous reports improves the organization's effectiveness on a real time basis and helps to increase efficiencies, ultimately improving the bottom line.
- Business analysis that helps to identify deficiencies in current processes provides a tool that enables continual improvement over process and contract management, increased visibility, and reduced revenue leakage.
- Workflow processes that correctly navigate contracts through the approval lifecycle means that standards and regulations are adhered to, there is improved compliance with business processes, and reduced errors.
- Automated forms that collect and translate vital information means more useable data, increased business intelligence and data utilization.

## The Return on Investment

The client found their contracting process had improved visibility, access and efficiency after the Upside Software implementation. Their contract stewardship also experienced improved visibility, and much quicker and efficient access to contract information. They could now measure contract compliance and performance, and gained online access to the entire text of their contracts, including all pricing details. The vast reporting features of UpsideContract improved their reporting capabilities on all contract data and gave the client instant and useful information.

UpsideContract's workflow improved the client's review process and ensured contract administrators followed the correct procedures throughout the contract lifecycle. In addition, they now have electronic notifications of contract actions as well as tier levels available for searching and reporting.

## What's Next?

The client plans to continue with the latest versions of the Upside Software product suite and take advantage of ongoing enhancements while looking for ways to interface with other applications.

## Strategy

- Implement UpsideContract, UpsideRFX and UpsideForms, and create a centralized, searchable document repository.
- Use UpsideContract's built-in auditing capabilities and robust reporting features to track all client transactions.
- Configure UpsideRFX to generate a transparent procurement process, ensuring all data is traceable and a clear procurement execution process is documented.
- Collect important data through client specific UpsideForms.
- Create a comprehensive workflow driven by notifications sent to all stakeholders at key contract lifecycle milestones.
- Ensure time sensitive rules are configured within the system to ensure records are automatically locked once specified criteria are met.

## 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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