The Free Prototype That Mobilized a Non-profit

Business Overview

The International AIDS Vaccine Initiative (IAVI) is a not-for-profit organization collaborating with more than 100 academic, industry, and government organizations around the world to ensure the development of safe, effective, accessible HIV vaccines and other biomedical tools.

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> — Godfrey Branch, IAVI IT Director

Challenges

Everyone at IAVI loved its homegrown contract management portal, Contract Central. It was familiar and it did what it was supposed to do. Unfortunately, it was built on technology that the IT group could no longer support and the business impact loomed large. Team members Renee Boyer and Godfrey Branch faced the daunting challenge of replacing a beloved system with something that might not measure up.

If IAVI's core business were to continue evolving, the organization needed to identify a cloud-based system that would not only meet the high expectations set by the previous solution but carry the organization into the future. First, it would need to capture financial codes and cost centers from the ERP system for expense tracking and billing purposes. Contract requestors had to determine the available budget before initiating a workflow. All these calculations would take place in the background and seamlessly link data from other sources.

Industry

- Non-profit

Challenges

- Replacing a well-liked system that reached its end-of-life

- Incorporating financial/cost center codes and budgetary breakdowns into the contract management workflow, triggering relevant approvals from budget directors and restricting visibility of those contracts to users with access to those cost centers

- Extensive approval tracking including time stamps for all events associated with each contract accompanied by automated but granular statuses, visible to users at all times

Agiloft Solution Benefits

- Unlimited free trial allowed for development of no-cost, robust prototype to ensure employee adoption

- Integration with IAVI's ERP system, DocuSign, and Active Directory (for single sign-on)

- Complex workflows with unique configurations and forms supported by flexible rules and automation

The next challenge pertained to the sheer volume of documentation. The initial import would include not just the current and historical contracts but also supporting documents: over 12,000 in total. It would require a system capable of tracking and storing these supplementary materials while making them easily accessible.

In addition, the solution would have to offer strong search functionality capable of sorting through this mountain of information.

Finally, IAVI required a unique configuration for its approval process and permission structure. This included support for single sign-on and DocuSign integration for e-signatures but also extended beyond these technologies. Certain end users needed to be able to approve contracts after reviewing detailed budget breakdowns and information distributed across different cost center codes, and only users with access to those restricted cost centers could view the contracts. All events related to the contract needed to display a timestamp, and many updates and events would also automatically update the status and an auto-generated HTML "Contract Summary" that would always be visible at the top of the page. Additionally, all events and updates would be logged in one of the tabs in even greater detail so that a complete audit trail was always visible.

The Search

Initially, IAVI hoped to integrate contract management into its existing ERP system. It soon became clear that would result in limited functionality at a high price. The team considered the plethora of tools available on the market. However, none of the ones they considered had the same configuration as their legacy system, nor the option of different forms for different users, nor the ability to add necessary fields. Then, they came upon Agiloft with an offer for an unlimited free trial. IAVI took full advantage of the opportunity and tested the free, yet robust, solution for six months with focus groups and decision makers.

IT Director Godfrey Branch shares: "A big part of our process was Agiloft's unlimited trial. There was no rush and no cost, yet they partnered with us and gave us very personalized support. They helped us set up the workflows that were critical to get company buy-in. Agiloft supported us from the start, even when there was no financial benefit. The prototype allowed us to have something tangible to share with our employees—people have to see the solution and the potential. We weren't forced into a regimented process and then hurried to commit. It gave us flexibility and allowed us to address concerns. It makes everything easier and you don't find yourself with a solution that comes up short or that users won't adopt. I get dozens of calls every day, but this wasn't a sales pitch. Agiloft helped us create a robust prototype and then let us make our own decision—no sales, just the resources to get things moving."

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> — Renee Boyer, IAVI IT Business Analyst

The Project

IAVI and Agiloft partnered to ensure a successful release of the new solution. The implementation included DocuSign integration, single sign-on support, configurable metrics and reports, and flexible workflows. With IAVI's sophisticated approval process, the finance team, grant team (reviewing donor requirements), and all the parties involved have a role in the workflow. Given the flexibility of the Agiloft platform, the IT group was also able to extend the solution to the HR department's consultant contract process.

"Agiloft exceeded our expectations," said Renee Boyer, IT Business Analyst. "With the prototype we got a good sense of how much we could do but during the implementation we pushed the limits

of the software, and each time Agiloft met the challenge. We made a lot of configuration changes, yet we were still within the out-of-the-box structure.

The partnership that we had with Agiloft also exceeded anything we had anticipated. They are a very valued business partner. [Agiloft Project Manager] Chris Pankaew was just an extension of our team, giving us guidance based on best practices. Overall, given what we gained and all the system capabilities, it's an incredible value for our investment."

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— Renee Boyer

Solution Benefits

Since implementing the Agiloft solution, the response time for contract requests has decreased dramatically, from weeks to days. This increased efficiency hasn't negatively impacted data accuracy; in fact, the volume of data has increased

and become more comprehensive and critical to IAVI's dynamic reporting. In addition, descriptive tracking allows users to pinpoint any issues in the approval cycle.

Renee and Godfrey now regularly hear from users that they have better visibility into the status of their contracts and that it's more intuitive. They've become reliant on it and continue to add in new functionality to support the business. In the big picture, this leads to fewer questions and less confusion because users can so easily navigate the system. Even the approval process is streamlined. No more 'sign here' tabs piled high. Now, everything is done electronically, through email, while team members are on the go.

"You always hold your breath when there's software integration involved, but DocuSign has upgraded multiple times and our solution has not been disrupted," Renee recounts. "With Agiloft, we have a solid foundation that can grow with our business and it's truly agile. That's what's needed in today's world."

Let Us Show You

What Agiloft has done for IAVI, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

About Agiloft, Inc.

As the global leader in contract and commerce lifecycle management (CCLM) software, Agiloft is trusted to provide significant savings in purchasing, enable more efficient legal operations, and accelerate sales cycles, all while drastically lowering compliance risk. Founded in 1991, Agiloft's adaptable no-code platform ensures rapid deployment and a fully extensible system. Using contracts as the core system of commercial record, Agiloft's CCLM software leverages AI to improve contract management for legal departments, procurement, and sales operations. Visit www.agiloft.com for more.

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Date of publication: 3/15/2018