Non-Profit Reduces Time Spent on Contracts by 25%

Business Overview

Project HOME is a Philadelphia non-profit organization empowering individuals to break the cycle of poverty while working to alleviate the underlying causes of poverty. Founded in 1989, Project HOME achieves its mission through a continuum of services from street outreach, to supportive housing, and comprehensive services. With an unyielding commitment to the dignity of each person, Project HOME addresses the root causes of homelessness through neighborhood-based affordable housing, economic development, and environmental enhancement programs, and provides access to employment opportunities, adult and youth education, and health care.

Challenges

While Project HOME focused on serving the needs of others, its contract management process suffered. As Patrick Farrell, Project HOME's Business/Financial Analyst explained, "Contracts were managed by hook or by crook. We were founded as a grassroots organization, and we did everything through emails and paper." Until recently, many of the contracts with the City of Philadelphia had to be hand-delivered.

As for managing the contracts, some were kept in filing cabinets. Others, attached to emails, were stored in folders on a shared server. Locating a contract was often a challenge, especially when someone took a file out of a cabinet and didn't return it for a few days. There was no reliable method for storing contracts or tracking them through the review and approval process.

Compounding these issues, Project HOME was growing rapidly and expanding its services. The number of contracts increased, and more and more people were involved in the process. It took missing a deliverable to bring about change. Even though it was a relatively minor mistake, it was enough to convince Project HOME executives that they needed a contract management system to avoid having anything like it happen again.

Industry

- Housing Services Non-profit

Challenges

- No central repository for contracts
- Over-reliance on paper and email
- No way to track reviews and approvals
- Increase in volume and complexity of contracts due to rapid company growth

Agiloft Solution Benefits

- Review and approval workflows and tracking
- Custom reports and dashboards
- 25% reduction in time spent on contract administration
- Extendable functionality

The Search

To choose a solution, Project HOME assembled a team from IT, Legal, HR, and Accounting with Patrick as its lead. The team created a matrix of requirements that included a central repository for contracts, ease of reporting, consistent look and feel, usability, approval workflows with tracking, and the ability for the system to grow with technology. It also had to be hosted "in the cloud" as are all of Project HOME's other business applications.

Beyond the technical requirements, Project HOME wanted a stable company with credibility in the industry and a proven record of client support. They were looking for more than a contract management system; they wanted a company behind it that would continue to support them long after the initial implementation.

> "Contracts were managed by hook or by crook."
>
> — Patrick Farrell, Business/Financial Analyst

After conducting some research and getting recommendations from other companies, the team narrowed their search to five vendors and had them do two rounds of remote demos. "Agiloft gave the best demo and answered all our questions without a problem," according to Patrick. "We all said, 'These guys know what they're talking about.'"

One of the biggest selling points was flexibility. As Patrick put it, "Agiloft's application is set up very flat, a series of tables that you can build on your own and use to launch rules and reports. It came easy-to-use out of the box along with an asset tracking system, a help desk system, and we didn't have to pay extra for that." Patrick concluded, "You can build on to Agiloft anything you want. We feel like we got more than we paid for."

Project HOME, like many non-profits, has limited resources and budget. Agiloft's combination of reasonable price, support, and flexibility was very important to them and made Agiloft Contract Management Suite the easy choice.

The Project

Getting the system up and running was a collaborative effort between Patrick and Yuhao Zhou, Agiloft's lead Implementer. With a background in web development, and experience with other business applications, Patrick was eager to jump in and do a lot of the work himself. He explained his involvement this way: "In the beginning, I would discuss with Yuhao what I thought we needed to do and he would do it. But it quickly became where I was able to go in and figure things out. I felt the more I could do, the more I would learn."

The implementation went quickly with Patrick and Yuhao working on it together. It took them about 2 months, but according to Patrick, they probably could have done it even faster. "Yuhao built the foundation and I asked a lot of questions. Honestly, I felt like I understood things in 2-3 weeks." Patrick estimated he did approximately 40% of the implementation himself, with plenty of guidance from Yuhao. "He was very easy to work with – very flexible." He added, laughing, "It was me doing a lot of things and Yuhao correcting my mistakes."

Yuhao helped Patrick work through a few tricky issues, including setting up contract types and subtypes, and creating a way to associate housing units and residential properties with specific services contracts. Other than that, the implementation was generally straight-forward and Patrick was impressed with how smoothly it went. When asked if there was anything they wanted in the system that they couldn't find a way to implement, he didn't hesitate, "No. Everything we set out to do, we were able to do. It was a very nimble process."

Solution Benefits

Project HOME has seen real benefits with Agiloft, even though they haven't formally quantified them. "Unscientifically, I know that with one place for all the contracts, we're not missing anything anymore," said Patrick. "We're using the approval workflows 100%, and before a contract is fully final, people need to put eyes on it and say, 'Yeah, I looked at it.' And that's trackable for the executives."

From the usability and time-saving standpoint, Project HOME's contract administrator estimates users have reduced their time spent looking for and managing contracts by 25%. Patrick likes the flexible reporting and how easy it is to create custom dashboards, a feature he enjoys showing to users so they can create their own. Some users are also using the mobile version of Agiloft for approvals and to check their assigned tasks. "We've been very happy with Agiloft," he said, adding "It's cost effective, too."

One of the main reasons Project HOME chose Agiloft is its flexibility. Being able to extend Agiloft to meet future business needs themselves without incurring significant additional costs is very important to them. Patrick is enthusiastic about using Agiloft for more than contract management. "For example," he explains, "I could hang up this call, go back to my office, create a simple help desk system for our accounting department, call you back tomorrow, and tell you it's done." He is investigating using Agiloft's API to link to some of their other business applications. Project HOME also plans to take advantage of Agiloft's support for e-signatures. For now, he is very comfortable with administering and modifying the system for contract management as their needs evolve.

> "You can build anything you want onto Agiloft. We feel like we got more than what we paid for."
>
> — Patrick Farrell
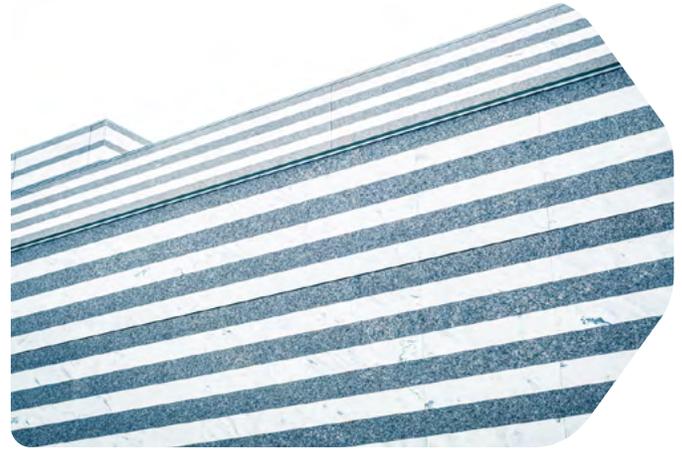
Patrick summed it all up: "We like working with Agiloft as a partner. The implementation went very smoothly and we feel their support is really good. We're very happy with Agiloft."

Let Us Show You

What Agiloft has done for Project HOME, 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.

Date of publication: 2/26/2018