

# Automating CLM Allows Non-Profit to Focus on Mission



## Business Overview

Established in 1978, Safe Horizon is the largest non-profit victim services agency in the United States. The organization has demonstrated devotion to the cause as well as savvy business practices in achieving near-impossible goals. Each year, they support more than 250,000 New York children and adults in the move from crisis to confidence.

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– Harvey Minot, Senior Application Developer

## Challenges

Safe Horizon staff struggled to manage contracts and payment requests. The organization dealt with eight types of hard-copy contracts, each with different workflows and specific headers and detail sheets. The financial and legal departments needed to vet each contract, often sending it back to the originating team. Then, contract and payment requests needed to be approved by the purchasing department; those over \$50,000 are sent on to the CFO. After approval, an internal document was added to the invoice. In the age of paperless business, the process was antiquated and inefficient.

Not surprisingly, contract and payment requests fell through the cracks, and employees had no way of tracking the status. Renewals would lapse as alerts would be sent to various employees, some of whom had left the organization.

## Industry

- Non-profit

## Challenges

- Manual, hard-copy contracts and payment requests combined with rudimentary, home-built system
- Limited user adoption
- Convoluted workflows and cross-department frustrations
- Accountability and actionable progress hindered by cumbersome bottlenecks

## Agiloft Solution Benefits

- Intuitive, automated, end-to-end system for contracts and payment requests
- Financial and legal resources can focus on pressing matters, instead of doing paperwork and follow-up
- Flexible system—tailored to unique, complex workflows

## The Search

Safe Horizon recognized its need for a full-fledged contract management system. Although the IT staff had created a basic, rudimentary solution using Microsoft Access, it went unused.

On its list of must-haves for the new system were a contract repository, tracking, automatic renewal notifications, and reporting.

Safe Horizon considered various implementations of SharePoint and .NET, most of which involved extensive coding and expensive price tags. One company quoted \$100,000 per year—a high number for a non-profit. “There was no way we could afford, from a financial or time point of view, to have something written from scratch,” said Harvey Minot, Senior Application Developer, Safe Horizon. “And I knew that we would have many changes. Someone would have had a full-time job for years if we’d gone with a hard-coded solution.”

Agiloft’s Contract Management System was an economical, out-of-the-box answer to Safe Horizon’s problem. “The cost was compelling, and we wouldn’t need a programmer. I didn’t see anything else for the price point that had the capability and modifiability,” Minot said. He also appreciated the built-in asset, project management solutions and help desk, for no extra cost.

As Agiloft’s implementation team explained, “The Safe Horizon template contains the full set of contract management tables and functionality. Behind the scenes, all other tables are already there, waiting to be configured and used.”



## The Project

The July 2016 implementation was multi-stage, due to Agiloft’s adaptability. The initial go-live took less than 80 hours. The system has been continually sculpted to reflect Safe Horizon’s unique workflows, including built-in integration with DocuSign and hosting on Safe Horizon’s own servers. “Each department here does things differently, and every time I would demo a version, a department would make another request,” said Minot. If the request was simple, Minot would handle it, sometimes in mere minutes. “With Agiloft, we make changes on the fly very quickly.”

For the 50 or so modifications that were more involved (such as a workflow change), he would bring it to the Agiloft implementation team. “If not for the flexibility of the system, the continual maintenance would have required a ton of custom code,” said Minot. “It proves the resiliency and power of the system. Every outlandish request by my users has been accommodated by Agiloft.”

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## Solution Benefits

Now, contract and payment requests are easy to track. “The system captures everything that happens at every stage and on every piece of paper – all in one place,” said Minot.

Response times are faster. Renewal notifications do not fall through the cracks. And employees can quickly determine the status of payment requests.

All the data is available in one place, allowing users to view it with just a click. "With renewals, we can determine the status of open contracts and anticipate how many contracts will be renewed. So, we can forecast the amount of money involved," explained Minot.

Moving forward, Safe Horizon intends to broaden the rollout to 59 unique departments. Overall, Minot said, "I highly recommend Agiloft. It is one of the most modifiable systems out there. You can go in with confidence that you will get a very functional, high-quality implementation."

## Let Us Show You

What Agiloft has done for Safe Horizon, it can also 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.

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## About Agiloft, Inc.

As the global leader in agile contract lifecycle management (CLM) 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. 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 CLM software leverages AI to improve contract management for legal departments, procurement, and sales operations. Visit [www.agiloft.com](http://www.agiloft.com) to learn more.