

Client Success: Top-tier U.S. financial institution

Enabling teams to leverage DS technology to realize value by increasing efficiencies, improving the client experience, reduce cost, and increase compliance.

Region
North America

Market Segment
Enterprise

Industry
Financial Services

Products
DocuSign CLM and Insight

CLIENT CHALLENGE

The client was looking to increase process efficiencies, improve the client experience and reduce cost around their contract processes, specifically:

- Optimize their hybrid ecosystem
- Build a product management framework
- Build a product roadmap
- Educate the business on DAC suite and the best use cases to leverage AI technology to extract more value from their existing tech stack
- To increase compliance and efficient in creating regulated agreements such as ISDA and contracts that required to comply with Qualified Financial Contract (QFC) Stay rules.

CIMPLIFI SOLUTION

Cimplifi provided:

- Ongoing advisory services on optimizing their existing on-premise environment and what a future state operating model would look like in the cloud
- Training & enablement of BU (table data extraction and automation)
- Ongoing advisory services on CLM implementation best practices

Advisory Services

- Whitepaper: Cloud v On-Prem
- Risk analysis
- Product management roadmap with training, rollout, and automation
- Prioritized product roadmap
- CLM implementation best practice artifact templates

BUSINESS RESULTS

As a result of a successful client advisory engagement, the client achieved:

- Enabled BU to leverage Insight to extract table data
- **Table automation proof points** zero capture to 20-30 contracts
- Migration paper influenced initiatives to promote and implement cloud-based solutions for all future projects
- CLM implementation best practice advice to ensure a sustainable practice growth under product management framework

Engagement duration: 1 year and 6 months

Engagement completion date : On-going