



Breaking the Sales Bottleneck with Automated CLM



Health Catalyst is a leading provider of data and analytics technology and services to healthcare organizations. They help organize, normalize, and link the data from all different

systems and make it searchable by all users, even the non-technical. The company was founded in 2008 and is based in Salt Lake City, Utah.



This is a summary of a recent webinar we hosted with Health Catalyst.

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The Agiloft implementation has standardized contract generations and approvals, and we've freed up valuable resources and enabled transparency and visibility across the organization,

- Brittany Lees, Business Systems Architect at Health Catalyst



Challenges

- 1 Time wasted tracking down sales templates
- 2 Manual processes with little visibility and oversight
- 3 No streamlined process to request, receive, edit, monitor, and submit contracts
- 4 Struggle to track document progress and status



Agiloft benefits



Templates are centrally located in one platform for easy completion and submission



Activity dashboard to quickly see the status of all documents



Centralized command and control center for all communications related to documents



Streamlined five different siloed contract flows into one standardized process



Integration with Salesforce to optimize sales cycle

Challenges

In the past couple of years, Health Catalyst underwent a major internal transformation. They went from a single business unit of just a few hundred employees to acquiring five additional companies in the span of two years.

The scaling up of the company meant that they needed tools and solutions that could scale with them. They found that their previous methods of tracking contracts through emails and spreadsheets was no longer tenable. "We had no way to track where our contracts were, provide any type of metrics. Our version control was definitely a problem, and we really needed to have a consolidated approach that was scalable as we continue to grow," said Brittany Lees, the Business Systems Architect at Health Catalyst.

Before implementing Agiloft contract lifecycle management (CLM) software, Health Catalyst was dealing with sales contracts and templates manually via email. This process provided them with no visibility, making it difficult to track submissions, requests, and the progress of the documents. On top of this, the lack of transparency caused confusion among the sales team as they struggled to remember where documents needed to be sent. "I was constantly getting emails asking, 'Where does this go again? Who should I send this to?'. So, it really was just not an efficient process," said Lees.

The Search



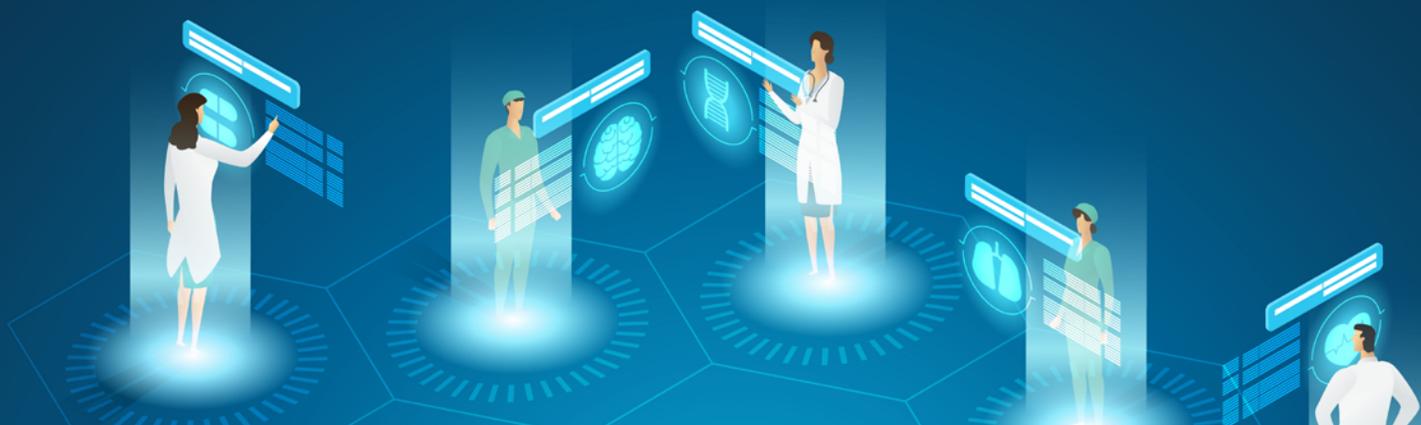
It was critical for us that Agiloft synced with our Salesforce process, and we use Agiloft not just for a CLM but for our selling documents as well."

– Brittany Lees

In looking for the right CLM partner, Lees already had a clear picture of what the ideal solution should look like. Health Catalyst needed an initial request page that streamlined information to improve process efficiency.

Next, they wanted a platform that could establish a review process and approval. It would provide transparent reports and dashboards so you could track your documents in the process at all times. There would also be designated owners for each point in the process along the way with established stakeholders.

Finally, and most importantly, it was essential that the CLM solution could sync with Salesforce. Since Salesforce isn't known for its document repository, Health Catalyst wanted a solution not just for CLM but also as a repository for their selling documents too.



The Project

Despite the clear inefficiencies of Health Catalyst’s previous contract management process, not everyone was on board with implementing a new solution. “But after drumming up quite a bit of support with our stakeholders and having them sit through demo after demo, I finally got them on board,” Lees said.

But what really changed their minds was when they leveraged Agiloft’s command centre after the initial implementation. “We had a command centre where all of their requests were coming in, and all of a sudden, they quickly were able to go, oh my gosh, we generate 60 contracts a month, whereas before there was no way for us to even be able to tell that,” Lees said.

During the implementation, Lees had set out specific goals and requirements. One of the main goals was to combine five individual contract flows that were operating in silos. The aim was to integrate them into one standardize process.

“We needed a unified approach that was consistent and measurable and scalable across the organization. And another goal that we wanted to accomplish was to integrate this with our selling process. We felt strongly that sales and legal needed to work closer together,” said Lees.

Solution Benefits

After managing contracts manually without any visibility into the process, Health Catalyst was finally able to build a central repository for all their documents. Not only that, they also have access to an activity dashboard which allows employees and managers see the status for all documents. Plus, communications are no longer reliant on emails and overflowing inboxes. Health Catalyst users were provided a centralized command and control center for all communications related to documents.

The biggest game-changer that Agiloft provided Health Catalyst was its ability to sync to Salesforce. The seamless integration meant that employees could input bidirectional feedback between the two solutions. Essentially, any changes that are updated on Agiloft—for example, changes in pricing or discounts—are synced back to Salesforce.

“The bidirectional feed has been key. It’s really enabled us to keep a seamless process depending on what system you’re in. You’re able to update information wherever you’re at,” said Lees.

The syncing can occur throughout any stage of contracting. Since Agiloft keeps all of Health Catalyst’s documents in a single repository along with the version controls, any specific actions and approvals that happen as the contract goes through various stages are also synced back to Salesforce.

With the marriage of contracting and sales together, the data from the CLM also helps them with Salesforce forecasting. The visibility gained provides insight into where they are within the overall lifecycle and gives an indication of where they can close deals.

The integration of Agiloft with the rest of Health Catalyst’s tech stack (Tableau CRM, Salesforce, Workday) has greatly impacted the organization. Now, they’re able to see all the metrics and data in a single environment. “So we’re able to see everything from where we’re at within a pipeline [like] when we think we’ll close the deal to contract metrics and retention rates, all the way to invoicing.” This insight empowers sales and account managers to be more proactive—allowing them to be able to spot fires and put them out before it gets too big. And the results speak for themselves, “We’ve been able to really turn quite a few of those potential non-renewals around,” Lees said.

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What Agiloft has done for Health Catalyst, 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. Give us a call to schedule a time.



Call us at 650-587-8615

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As the global leader in 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 for more.