



### OVERVIEW

IN AUSTRALIA, AMP is a leading provider of retail and corporate superannuation and retirement income products. They have one of the largest aligned planner forces in Australia and New Zealand. They are also one of the region's largest investment managers, with more than \$114 billion in assets under management (as of December 31, 2009). AMP has approximately 795,000 shareholders, more than 3.6 million customers, more than 3,500 employees and more than 2,000 financial planners in Australia and New Zealand.

With a large customer and asset management base, AMP has been aggressive at streamlining their organization, as well as looking for better ways of delivering higher quality services to their customers, while managing their business and their growth more effectively.

### CORPORATE CHALLENGES

Key Information Workers were unable to find needed information easily and/or they had to use workarounds to internal processes in order to get the information. At times, these workarounds were at odds with the company's internal policies and they risked violating these policies to obtain the necessary data.

Management also needed the ability to monitor obligations and rights, receive notifications of pending contract expirations, and implement a sophisticated contract approval process with alerts and approval escalation procedures.

### CLM MATRIX STRATEGY

The CLM Matrix team worked with AMP's key IT business analyst who owned the interface with the functional business units and

### CHALLENGE

To streamline the company's contracting process and provide visibility for appropriate parties to reduce risk and improve customer service and profit performance.

### SOLUTION

Implement Matrix-Enterprise™ to configure the key business rules and automate workflow approvals, to create significant efficiencies and opportunities.

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## ABOUT CLM MATRIX

contract management evaluation team. Through various collaborative work sessions, CLM Matrix helped AMP clarify their key business requirements. Matrix-Enterprise was selected based on its ability to handle the company's current and future needs.

### KEY SOLUTION ELEMENTS INCLUDED:

- Strict adherence to process workflows.
- Automation and standardization.
- Visibility into their contracts and data via a central repository, alerts, and notifications.
- Robust reporting and business intelligence capabilities for all functional areas.
- Legal library for increased control and hassle-free updating.
- Wizard based tools giving them the flexibility to dynamically build their contracts.
- Contract approval process customized for their internal requirements and governance.
- Integration with email platform to archive all correspondence relating to contracts.
- System that's intuitive, easy to use and built on a strategic content and collaboration platform.

In addition to providing AMP Financial Services with a powerful and aligned contract management solution, the company's employees receive the added benefit of the software being built on top of the Microsoft platform – which means they are immediately familiar with the interface and minimal training is required.

CLM Matrix is the market leader in Contract Lifecycle Management (CLM) software solutions on Microsoft Office and SharePoint technology platforms. Our solution extends the functionality of traditional contract management software by adding features such as:

- Rule-based document creation
- Clause libraries
- Policy-based approval workflow
- Automated reminders and alerts
- Real time user defined reporting
- Integration with legacy enterprise software
- Contract compliance tracking
- Multi-language capabilities
- Support for global environments
- Fully configurable to specific process and document types without code (wizard driven)



To learn more about CLM Matrix and our award winning software solutions, please visit [clmmatrix.com](http://clmmatrix.com) or contact us directly at 1.800.961.6534.