



## OVERVIEW

ARTHUR J. GALLAGHER & CO., is one of the world's largest insurance brokerage and risk management services firms, providing a full range of retail and wholesale property/casualty (P/C) brokerage and alternative risk transfer services globally, as well as employee benefit brokerage, consulting and actuarial services. A.J. Gallagher also offers claims and information management, risk control consulting and appraisal services to clients around the world.

On average, A.J. Gallagher manages hundreds of thousands of contracts annually across the customer lifecycle: New agreements, renewals, addendum (adding services), and amendments (changing terms).

CLM Matrix conducted productivity workshops with key stakeholders in the company's contracting process (including IT, sales, accounting, quoting, account management and corporate procurement). These sessions defined the cross-functional requirements to produce early wins and deliver a solution that addresses all their concerns and goals.

## KEY SOLUTION ELEMENTS INCLUDED:

- Streamlined process so that there was congruency between what the clients were told would happen and what the contract's legal obligation stated would happen.
- Documentation and transparency including accounting for all service commitment changes and material changes (service creep). All parties would now understand the impact of these changes both financially as well as resource commitment.
- Single repository and legal clause library for consistency 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.

*continued*



## ABOUT CLM MATRIX

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)
- Streamlining and transparency for all addendums and amendments to existing agreements.
  - Milestone monitoring for deadlines, reviews, and renewals.
  - Notifications and alerts to all concerned parties when changes occur.
  - Access to system for appropriate parties — i.e., easy to update customer contact information and certain clause changes.
  - Intelligence and reporting to facilitate proactive decision-making.

The streamlined client activation process will allow A.J. Gallagher to better manage key rights and obligations will drive higher levels of customer satisfaction.



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.