



## Leading Technology Solutions and Service Company Driving Toward a 50% Reduction in Contract Cycle Time, Redeploying Resources to Drive Revenue Growth.

### Overview

**Country:** United States  
**Industry:** Technology solutions and consulting

### Customer Profile

A leading provider of enterprise content management and business infrastructure solutions to medium and large organizations that want to leverage technology to provide business efficiencies and a competitive advantage in the marketplace. Canon Technology Solutions (CTS) is the technology consulting arm of Canon U.S.A., Inc. which employs 11,000.

### Business Situation

CTS needed to increase the speed at which they could generate Statement of Work proposal contracts for improved customer responsiveness.

### Solution

With EMC and Microsoft® Partner C-Lutions, CTS is deploying CLM Matrix, a contract process automation and management solution based on Microsoft Office, Microsoft Windows®, SharePoint® Portal Server, and anticipated EMC Documentum integration®.

### Benefits

- Contract creation cycle time cut by 50%
- Contributions of over 30% revenue growth
- Enhanced SOW portfolio visibility

“CLM Matrix compelled us to standardize our SOW proposal process allowing us to streamline and automate a previously ad hoc, time consuming process that was not allowing us to respond quickly to urgent customer needs.”

Alan Weintraub, ECM Practice Director, Canon Technology Solutions

Founded in 1985, Canon Technology Solutions (CTS), a technology consulting arm of Canon U.S.A., Inc. is a leading provider of solutions and consulting to medium and large organizations. CTS specializes in enterprise content management, business infrastructure and IT managed services projects that, more and more, require quick turnaround of a Statement of Work (SOW) that outlines the scope of deliverables to be completed for a particular project. With help from C-Lutions, a Microsoft and EMC Partner, CTS deployed C-Lutions CLM Matrix, a contract lifecycle management offering based on Microsoft® collaboration tools including Microsoft Office, Microsoft SharePoint® Portal Server, Microsoft Windows Server™ 2003, Microsoft Exchange, and expected integration with EMC Documentum. Users anticipate a 50% cycle time reduction in SOW creation and approval, more rapid responsiveness to urgent customer project opportunities, improved deal capture, improved standards compliance, and a positive return on investment within 3 months.



“We wanted to leverage a solution built upon SharePoint Portal Server for tight integration with Microsoft Office, and ideally one that would also allow us to integrate with an EMC Documentum back-end repository for final version control, security and IRM.

Alan Weintraub, Practice Director  
Canon Technology Solutions

“CLM Matrix configuration was a snap! The wizards allowed me to quickly define our “FastTrack” Statement of Work contract process to be exactly what we wanted.”

Edward Pecelli, Business Analyst  
Canon Technology Solutions

## Situation

As business expanded, Canon Technology Solutions was challenged to respond to many customers' requests for Statement of Work contract proposals. The manual, ad hoc contract processes employed by CTS were not allowing them to quickly turn around SOWs for urgent customer projects, and were not allowing the business to scale effectively.

## Business Pains

CTS derives the bulk of its revenue from IT/IS projects with its customers. Creating Statements of Work was consuming more and more administrative time from the organization, and had become a bottleneck causing delays to some projects and a potential source of revenue leakage.

Alan Weintraub, Practice Director at CTS, realized that improved quality control and accelerated contract cycles would raise profitability. A Statement of Work contract initiative was implemented to address specific needs:

- Standardize document creation, workflow and approval routing
- Reduce sales cycles
- Establish best practices for SOW contract structure and content
- Improve ability to respond to urgent customer projects
- Free up internal resources for more profitable activities
- Measure and track contract performance metrics

## Solution

As an expert in technology solutions, CTS knew the features, functionality and technology set that would make for the ideal Contract Lifecycle Management (CLM) solution. CTS chose C-Lutions and its CLM Matrix for their internal use because it is built upon the Microsoft Office technology platform including Microsoft SharePoint Server.

## Decision for a Microsoft/EMC-based Solution

Prior to engaging C-Lutions, CTS had considered a number of contract lifecycle management solutions from other vendors. After CTS leaders saw a demonstration of how Microsoft technologies could be used to automate real business processes, however, the decision to proceed with CLM Matrix was easy. Says Alan Weintraub, “The Microsoft SharePoint collaboration tools were very attractive because they are so tightly integrated with Microsoft Office – a tool familiar to all our employees.” In addition, Canon liked the fact that CLM Matrix allowed them to use Documentum as an enterprise document repository for completed contracts. Many customers are looking to integrate their CLM system with an existing (or future) enterprise content management strategy in order to take advantage of their security, retention, and information rights management capabilities for strategic assets like contracts.

## A Modular Solution

The CLM Matrix solution is a web-based system fully configurable to any organization's process, rules, policies, and contracts. It consists of web-parts used to construct an automated framework for any contracting process and includes:

- **Knowledge Center** (historical research, training resources, and best practices)
- **Command Center** (contract initiation plus in-progress and historical contract portals)
- **Action Center** (workflow approval, negotiation, notification and collaboration)
- **Performance Center** (real-time process intelligence, metrics, analytics, reporting)
- **Configuration Center** (full wizard-driven no custom code system configuration)

## Implementation

The project was kicked off with a 1-day CLM Productivity Workshop to capture the future

“Recognizing the benefits moving forward, we have expanded our CLM Matrix and workflow design to go further upstream in the contract process by targeting Professional Services Agreements and New Client Setup forms which broaden our capabilities to all contract types, not just *FastTrack*.”

Scott Periello, Client Engagement Manager  
Canon Technology Solutions

state for “*FastTrack*” Statements of Work required for customers who needed immediate assistance. “Going through the workshop, forced us to rationalize our SOW contracting process and content,” says Alan Weintraub. Once Canon determined how they wanted their process to work, C-Lutions assisted them in configuring the CLM Matrix system to their unique needs. Configuration was complete in less than one week’s time; readied quickly for user acceptance testing and deployment.

### **Benefits**

Initially, CTS configured the system for its *FastTrack* SOWs. In doing so, CTS discovered that the value from the system could be expanded by adding PSAs and New Client Set-up Forms.

#### ***Enthusiastic Adoption, Minimal Training***

Because workers access and share information using a Web browser and familiar Microsoft Office programs, interaction with the system is highly intuitive, requiring no training. C-Lutions CEO Tim Sparks says, “None of us need to take a day of training to make online airline reservations, why should using a contract lifecycle management system be any different?” CLM Matrix was designed with a “no-code, no-training” philosophy. Configuration is made via wizards without the need for custom programming. As such, the system can be adapted to follow how an organization works using desktop tools in which users are already trained and confident.

#### ***Contract Life Cycle Accelerated***

CLM Matrix dramatically reduces the unprofitable administrative contract creation workload for Sales, Business Analysts and Accounting at CTS by giving them web-based access to contract workflow at any time. During initial contract creation, specific terms and conditions are retrieved and inserted into MS Word dynamically based on responses to

a contract initiation smart-question tree. This replaces the manual template-based methods that sales professionals previously used to create the contract, typically saving 50 percent of the time needed to create the first draft.

#### ***More Uniform Contracts Recapture Lost Profits***

CTS can respond to requests for Professional Service Agreement contracts in hours versus days. Manual contract cut-and-paste methods cause unnecessary delays in responding quickly to customers who have immediate project needs. The speed enabled by CLM Matrix helps prevent customer migration, increases Canon team productivity, and allows CTS to make better decisions faster while spending more face time with customers to discover new opportunities.

#### ***Technology Enables Profitable Growth***

With a Contract Lifecycle Management solution based on Microsoft and EMC Documentum technologies, CTS can scale and grow its consulting practice. Manual contract initiation, creation, and approval methods don’t scale well. To grow, many organizations hire 1 more person to get 1 more unit of capacity. “By standardizing and streamlining CTS’ processes, rules, policy and content, we are now able to automate much of our work. CLM Matrix has enabled us to scale our business profitably,” says Alan Weintraub.

#### ***Quick Return on Investment***

CTS’ investment in a Microsoft information technology (IT) infrastructure and the CLM Matrix provides quick payback. “Securing only one additional project, that otherwise may have been lost due to our inability to respond quickly enough, pays for the system,” says Alan Weintraub. CTS now plans to extend its investment in phase two by adding new contract types and leveraging Documentum as its final contract repository.

## For More Information

### C-Lutions

For more information about CLM Matrix and C-Lutions products and services, call (972) 899-2467 or visit the Web site at: [www.clution.com](http://www.clution.com)

To contact C-Lutions via email regarding questions or requests for information use: [sales@clution.com](mailto:sales@clution.com)

To view the Contract Lifecycle Management Solution Showcase with a demo of CLM Matrix please visit: <http://www.microsoft.com/office/showcase/contractlifecycle/default.aspx>

### Microsoft

For more information about Microsoft and Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

### EMC/Documentum

For more information about EMC and Documentum products and services, call (866)464-7381 or visit the Web site at: [www.emc.com](http://www.emc.com)

### Microsoft Office System

Microsoft Office is the business world's chosen environment for information work that provides the software, servers, and services that help you succeed by transforming information into impact.

For more information about Microsoft Office System, go to: [www.microsoft.com/office](http://www.microsoft.com/office)

### Microsoft SharePoint Products and Technologies

Microsoft SharePoint Products and Technologies facilitate collaboration within an organization and with partners and customers. Using the combined collaboration features of Windows SharePoint Services and Microsoft SharePoint Server, workers in your organization can easily create, manage, and build their own collaborative Web sites and make them available throughout the organization.

For more information about Microsoft SharePoint Products and Technologies, go to: [www.microsoft.com/sharepoint/](http://www.microsoft.com/sharepoint/)

### EMC - Documentum

The EMC Documentum collaboration products bring together people, processes, and content across an organization and between companies. Collaboration tools allow users to seamlessly exchange documents, ideas, and project plans, all with a real-time, online environment available anywhere in the world at any time. All information is stored in a central content repository where it can be linked and shared with other business applications and users.

For more information about EMC Documentum family of products go to: <http://software.emc.com/products>

## Software and Services

- Microsoft Office System
  - Microsoft Office Professional
  - Microsoft SharePoint Server
  - Microsoft Exchange Server
  - Microsoft SQL Server
  - Microsoft Windows Server 2003 Enterprise Edition
  - Microsoft Windows XP
- EMC Software
  - Documentum 5.3
- Technologies
  - Microsoft .NET Framework
  - Microsoft ASP.NET
  - Microsoft Windows SharePoint Technologies
  - Microsoft Windows Mobile

## Hardware

- Dell PowerEdge 840, Quad Core 2.4 GHz, 4+ GB DDR-2 memory