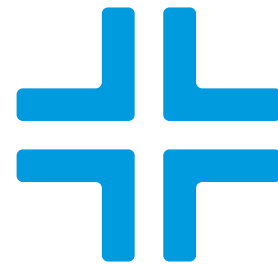


CASE STUDY

Professional Services Firm **Leverages AI and Automation** **to Streamline** Contract Management Process

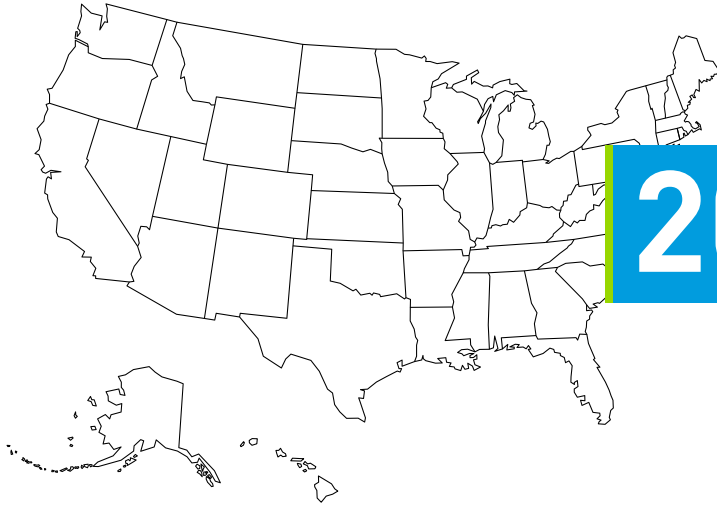
withum[®]





ABOUT THE CLIENT

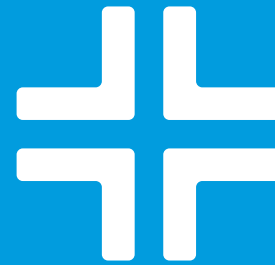
A professional services firm based in the Northeast, with a strong nation-wide presence with a growing client-base.



20+

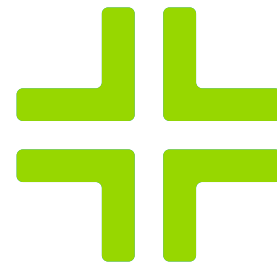
**OFFICE
LOCATIONS**

BACKGROUND AND CHALLENGE



The professional services organization received an overwhelming number of signed contracts and needed a way to approve and process them for invoicing.

Previously it took numerous employees to process and extract information from these contracts to populate their invoicing system, leaving plenty of room for human errors. There was also no visibility or reporting into the contract process. The organization investigated utilizing various commercial off-the-shelf software, but they wanted an easy way to modify the tools to meet their organizational needs. The organization was already an early adopter of Microsoft 365, so they decided to explore the options available using Artificial Intelligence and process automation to reduce human errors.



THE APPROACH AND SOLUTION

Withum worked with the client's IT, Legal, Procurement, and Finance stakeholders to ensure that the system would include all phases of the contracting process from initial submission through execution and closeout and be useful for departmental users and contract administrators.

The Withum team built the solution utilizing Microsoft Syntex to process signed contracts and extract relevant information and critical data.

The team then leveraged Power Automate to make it easy to streamline approvals and populate Line of Business applications for invoicing. Withum also provided support during user acceptance testing, change management, adoption and training for the product owner and IT team.



BENEFITS AND RESULTS

The new system powered by AI and automation immediately got high marks from contract administrators for usability and powerful search and filtering capabilities.

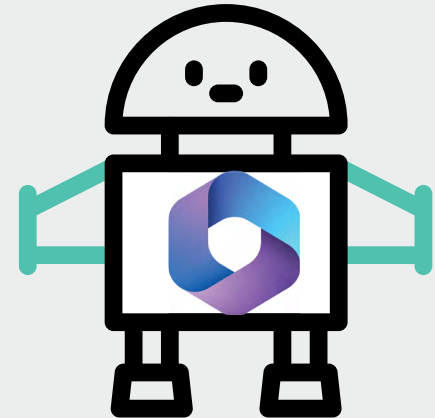
The previous manual process involved a significant number of employees and was prone to human errors.

By leveraging Microsoft Syntex and Power Automate, Withum developed a solution that processed signed contracts, extracted relevant information, facilitated streamlined approvals, and populated Line of Business applications for invoicing.





New visibility into vendor history and related contracts offered fresh insights, enabling better decision-making and more proactive management of the contracting process. [The success of the solution has prompted the client to explore extending its functionality for enhanced client/vendor relationship management and gaining better insight into daily operations.](#)



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