



TO : John Katzman, Keri Hoyt
FROM : Steven Tey (Summer '19 Product Intern)
DATE : July 11th, 2019
SUBJECT : Implementing SpringCM as the backbone of Noodle Partners' Contract Management System

Background

NP's contract management process is currently plagued by conflicting versions, unauthorized signatures, and lack of organization. We need to centralize and standardize our process to ensure mandatory terms are included, appropriate sign-offs are secured, and that renewals can be efficiently tracked and managed.

To facilitate an improved process, this memo proposes the adoption of the contract management tool SpringCM, part of the DocuSign "Document Cloud" suite. SpringCM will empower the NP team to improve the turnaround rates of contracts and increase operational efficiency as a whole.

Summary

SpringCM is sold as a three-year monthly subscription and costs \$xxx per user per month. To start, we intend to purchase the minimum package size available (15), and add more as needed.

We expect to hire a contract implementation team (see below) to facilitate the system build and uploading of existing documents. Given the current availability of product and technology resources and our accelerated time frame we felt it made sense to contract SpringCM's implementation partner, Spaulding Ridge. We expect to reach completion six weeks after kick off - at the end of August.

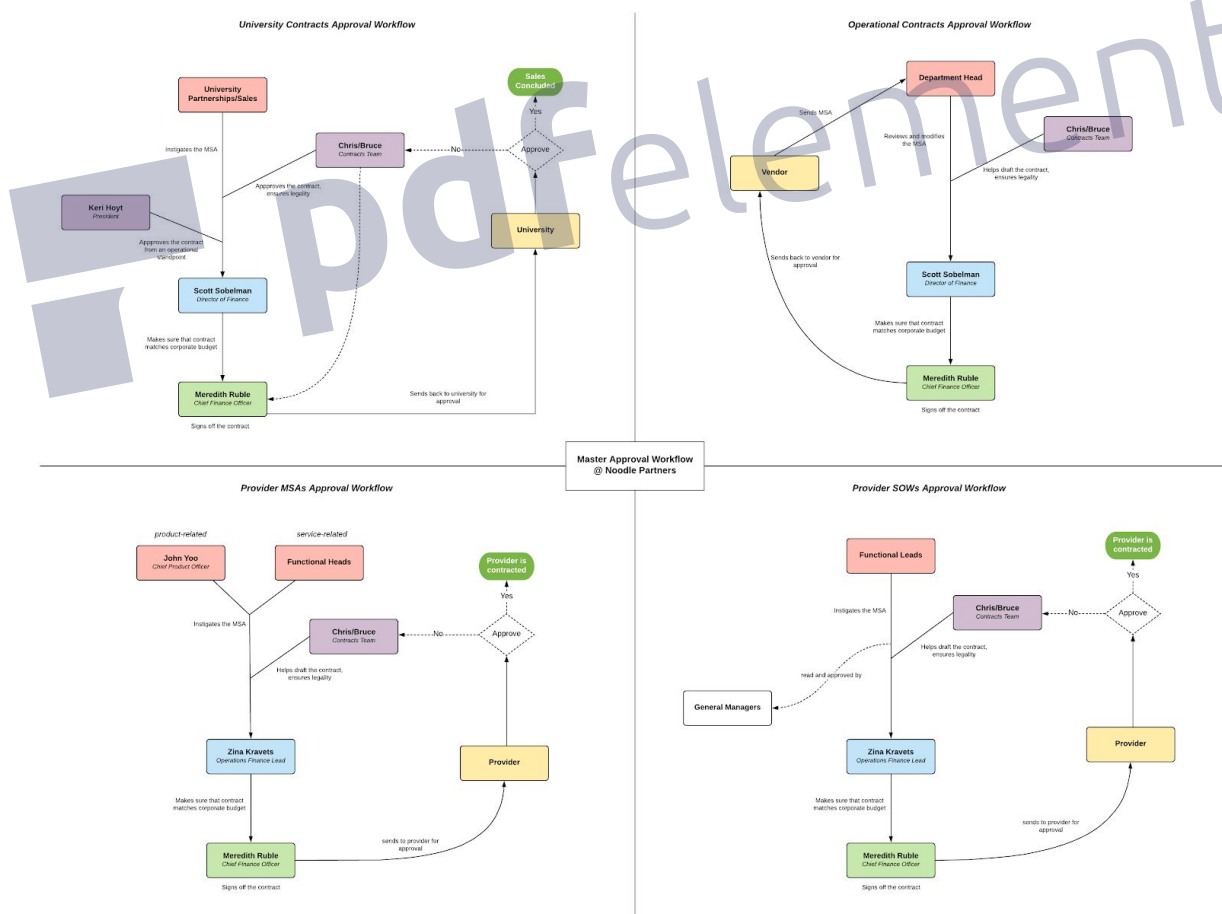


Evaluation

To understand the contract management system at Noodle Partners, Steven met with various key stakeholders:

- Claire Murphy (VP, Learning Operations)
- Jaimie Hoffman (Sr. Director of Student Affairs and Learning)
- Tiff Ryan (Sr. Director of Enrollment)
- Anne Stewart (General Manager)
- Keri Hoyt (President, NP)
- Stephen Green (Chief Program Officer)

After those meetings, multiple journey maps were prepared to delineate the contract management process at NP.





We are narrowing the scope of the legal review process to come up with a list of stakeholders who will be piloting the SpringCM Software at NP:

University Partnerships Team

- Kate Marcus
- Lee Bradshaw

Contracts Team

- Chris Serbagi
- Bruce Task

Finance Team

- Zina Kravets
- Scott Sobelman
- Meredith Ruble

Department/Functional Heads

- John Yoo (Chief Product Officer)
- Melora Sundt (Chief Academic Officer)
- Jarrod Jordan (Chief Marketing Officer)
- Stephen Green (Chief Program Officer)
- Russ Tarafdar (Chief Technology Officer)
- Keri Hoyt (President)
- Alan Mynek (VP, Solutions Architecture)
- Jeremy Rudy (VP of Product)

SpringCM was selected as the contract management tool for NP for the following reasons:

Optimizes Approval Workflows

- SpringCM will help NP build efficient approval workflows as we will be able to build out custom journey maps depending on the need - as delineated in the Master Approval Workflow diagram above. The contract will then be sent to the different stakeholders involved and they will have a deadline to sign the contracts.



- This should increase the turnaround rates of our contracts and improve operational efficiency on a company-wide level.

Massive Clause Library

- SpringCM also has a database of legal language that users can choose to use within any legal documents.
- Contract teams can create pre-approved languages for insertion into the contracts.

Salesforce Integration

- SpringCM integrates with SF.
- Once we move the sales team over onto the salesforce platform we can integrate SpringCM with SF.

DocuSign Integration

- Even before getting acquired by DocuSign, SpringCM partnered with the e-signature service provider to ensure seamless integration between the two systems.
- This allows NP employees to obtain the signature of vendors, providers, and university clients in just a few simple steps, whilst ensuring that all legal clauses are abided to.

High Configurability

- SpringCM is completely configurable depending on organization's needs
- Permission sets flexibility: All the individual fields within SpringCM can be set as read-only or editable

Reporting Capabilities

- SpringCM also has robust reporting capabilities
- The Activity Tracker feature within SpringCM is vital for project management
- Allows us to track various deliverables and trends over time to determine our ROI with regards to this project.



Pricing

Below is the pricing structure for SpringCM:

Subscription & Support				
Items	Units	Monthly Price	Year 1 Total	3-year Term
Enterprise Licenses	15	\$xxx.xx	\$xxxx	\$xxxx
Spring CM Admin Course	2	-	\$xxxx	\$xxxx
DocuSign Enterprise Pro	10	\$xx.xx	\$xxxx	\$xxxx
		Grand Total:	\$xxxx	\$xxxx

We are paying \$xxxx for the DocuSign Enterprise Pro, currently. We will receive a credit for the unused portion of our existing subscription (approximately \$xxxx) when we transfer over.

Not all SpringCM users require DocuSign Enterprise Pro as most don't have signing authority. There will also be several employees that we did not account for in the aforementioned list of stakeholders who will require access to DocuSign Enterprise Pro:

- Jeffery Horne
- Kathy Wasilewski
- Marianne Hoeft
- Claire Murphy



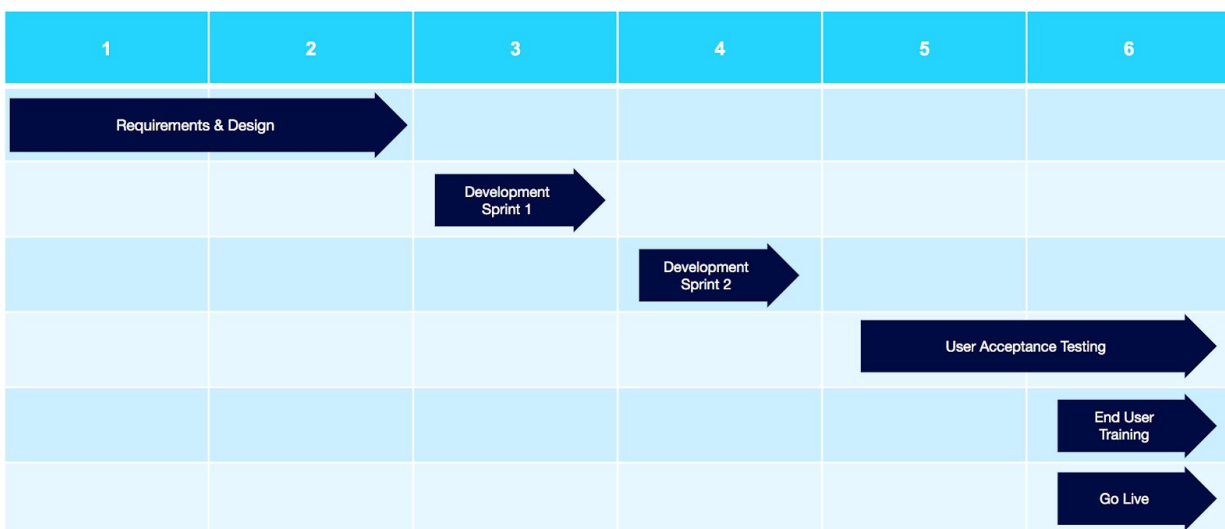
In addition, we will need to work with Spaulding Ridge - the third-party solutions architect team from SpringCM, to configure the system.

Role	Total Hours	Rate	Fees
Project Lead	XX	\$XXX	\$XXXX
SpringCM Analyst	X XXX	\$XXX	\$XXXX
		Total	\$XXXX

SpringCM suggested we hire Spaulding Ridge as the setup process is a rather intricate one. We should also factor in a 5-10% deviation from the price stated above, as we might not need that many hours to complete the implementation process if we work efficiently.

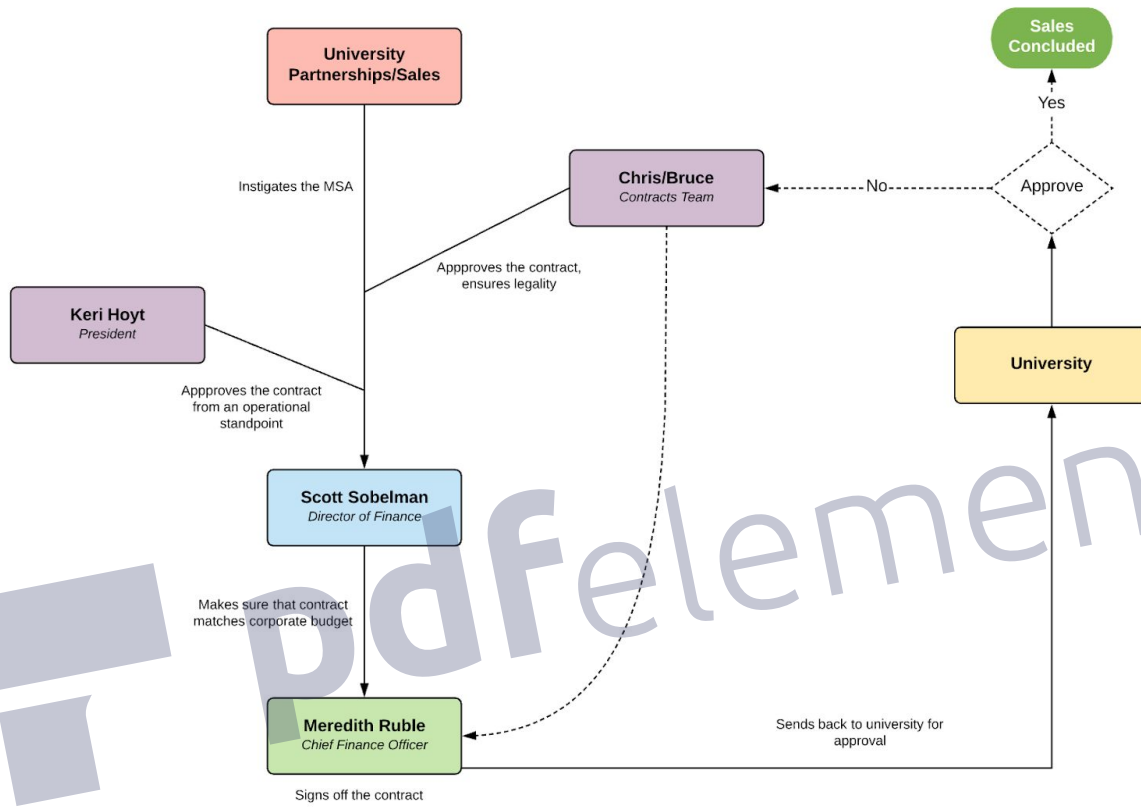
Gameplan

NP plans to implement and fully integrate SpringCM into our company's operations by the end of August. We will commence setup procedures starting next week.

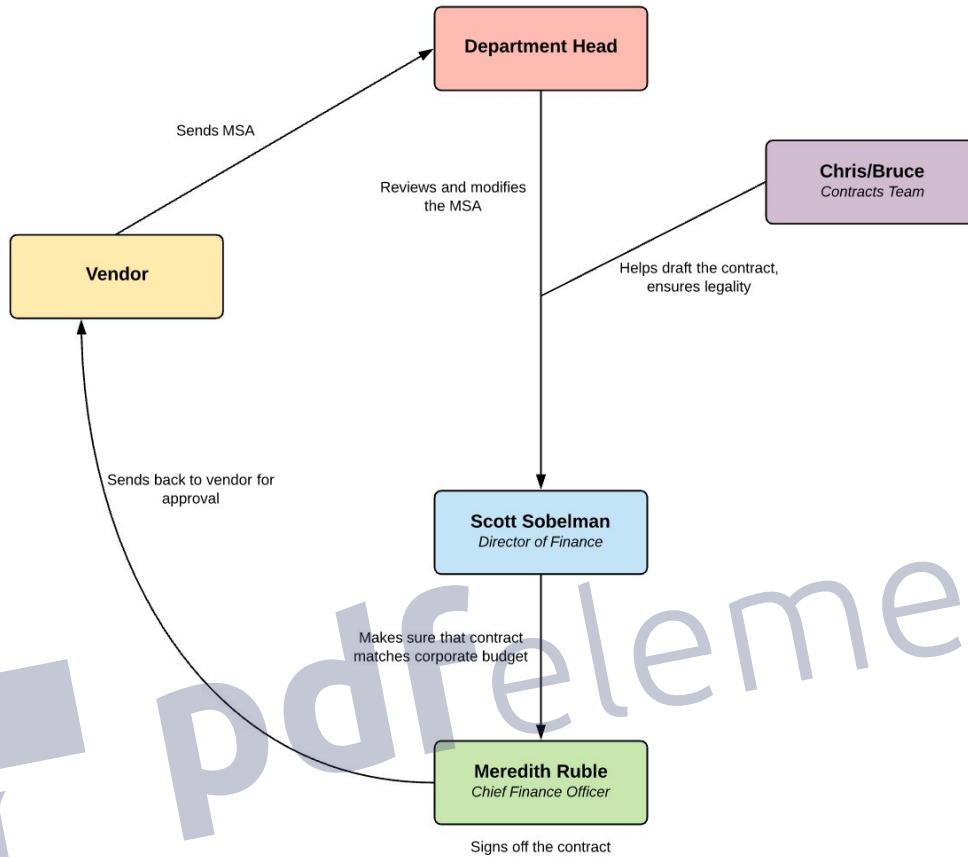


Appendix

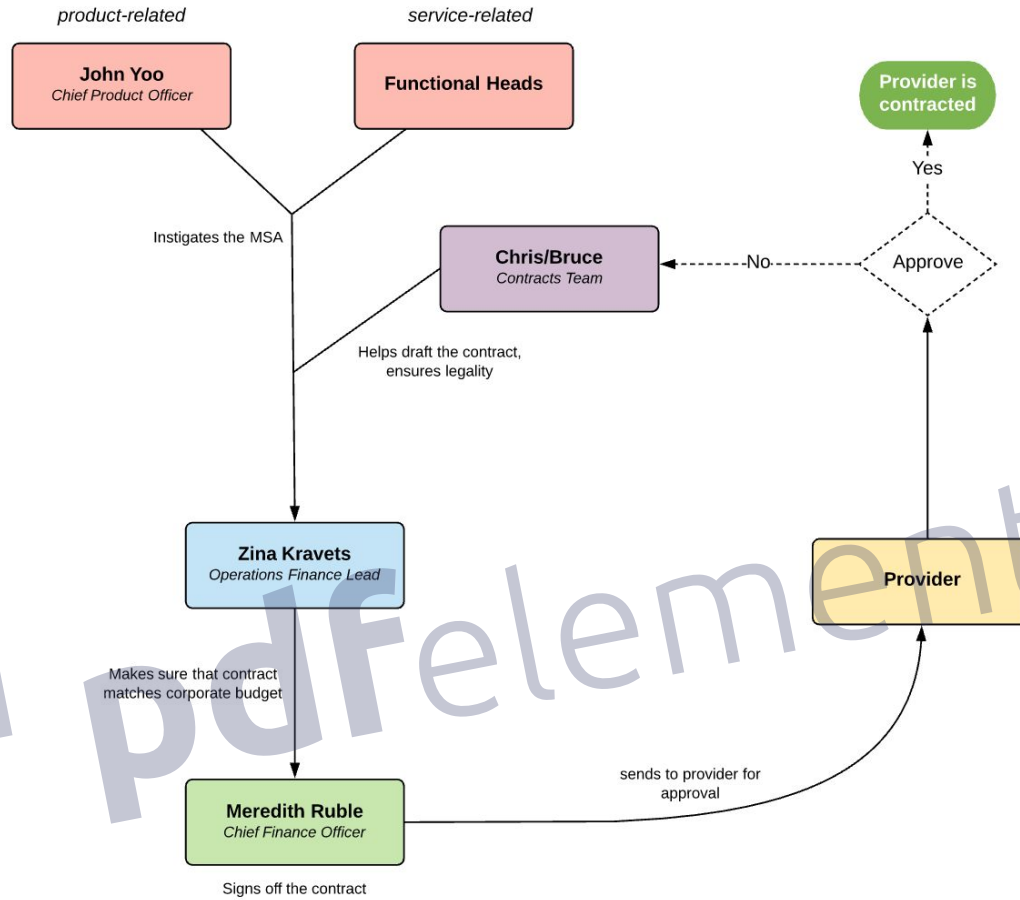
University Contracts Approval Workflow



Operational Contracts Approval Workflow



Provider MSAs Approval Workflow



Provider SOWs Approval Workflow

