

## Benefits from DocuSign CLM's automated workflow processes: it reduces risk and makes the long redlining process faster and easier.

Capital District Physicians Health Plan (CDPHP) was established in 1984 as a physician-founded and guided health plan. Currently, CDPHP and its affiliates serve members in 24 counties in New York with a full family of products.

### Moving volumes of paper to the Cloud.

Complex contracts and regulatory requirements had led CDPHP to put off the inevitable.

CDPHP came to DocuSign CLM in search of a contract management system that would finally move their paper files to the cloud. As a healthcare company, they produced a lot of paper and had a complex contracting process. CDPHP was required to submit changes in contract templates to the Department of Health, and was required to maintain compliance with many other regulatory standards. They had previously stored their data for contracts in an Excel file, which was susceptible to errors and inaccurate data – not to mention security breaches.

### Struggling with unreliable, antiquated methods for managing contracts.

CDPHP realized that their process was failing and that it could cost them business.

CDPHP works in three verticals: Ancillary, Physicians, and Facilities. Their facilities vertical, which accounts for 10% of their contracts, produces the most negotiated and typically the highest value contracts. These contracts could take six months to one year to finalize because of the amount of redlining that goes into them. CDPHP knew that they could reduce the timeline if they implemented a contract management application. After their network crashed while they were attempting to sign and close a major deal, they knew the time had come to choose a solution and make a change.

## Overview

### Healthcare & Life Sciences

Industry

501–1,000

Company size

Albany, NY

HQ location

1984

Founded

### Contract Management

Use case

**“We are using DocuSign CLM to assist with going paperless and storing all contract documents and artifacts electronically, while also managing the lifecycle of our contracts.”**

**Sarah Kennedy**

Network Operations Coordinator

## Salesforce integration and product flexibility were key requirements.

As a Salesforce Platinum Partner, DocuSign CLM offered that and more.

As a new Salesforce customer, CDPHP had started using the Sales Cloud CRM as a company-wide, primary source of contract data. Knowing this would be the perfect opportunity to implement a Contract Lifecycle Management tool, they turned to Salesforce-integrated apps to find the right fit. As a Salesforce Platinum Partner, DocuSign CLM provided the integration and the product flexibility that they needed.

## No more paper.

CDPHP moved its pre-existing contracts and documents to the cloud.

DocuSign CLM implemented a custom workflow for CDPHP that will decrease the time it takes to create a contract and walk through the negotiation phase with Facilities clients by at least 50%. CDPHP benefits from DocuSign CLM's automated workflow processes, which reduces risk and makes the long redlining process faster and easier. They have eliminated their paper-based system entirely, because DocuSign CLM moved all of their previous contracts and documents to the cloud as part of their implementation. Now, all of CDPHP's documents are in one organized, secure, searchable location.

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**“We live in a grey world — we need to be able to get from point A to point B in three different ways sometimes. DocuSign CLM gave us that flexibility in functionality.”**

**Sarah Kennedy**  
Network Operations Coordinator

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### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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