

# CASE STUDY

Portola Pharmaceuticals Uses  
Corridor's Contract Management  
App for SharePoint to Manage  
Complete Contract Lifecycle



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increased contract volume while insuring that the proper channels were followed for drafting, negotiating, and approving their contracts. This meant a system for the complete contract lifecycle – from request to creation, negotiation with external parties, documented approval, and reporting on metadata including contract expiration – all from a secure contract repository. It also meant a system with the flexibility to allow the use of internal and external paper as well as electronic signature. An easy-to-grasp user interface, and the ability to manage different contract types in different ways were also important business requirements. Most important, given a recent implementation setback, Portola needed both a technical success and a business success.

Portola's initial selection process suggested a contract management solution powered by the Salesforce.com platform. After an initial investment, Portola reconsidered its options – and went with Corridor Company's Contract Management App for SharePoint. The reason?

Pharmaceutical companies face unique challenges which call for an application with flexibility. Collaborative agreements for research, manufacturing, and distribution need careful internal review and ongoing monitoring. Regulatory requirements make it essential to capture contract approvals. Business users need real-time guidance in choosing the right agreement and supplying the information that will be required to successfully execute that agreement. In Corridor, Portola found a partner, not simply a vendor, whose application met their current priority needs for specialized contract creation and workflow, and also had the flexibility to readily accommodate future business requirements. Corridor's document assembly was powerful, versatile and responsive to varying conditions and agreement types. As important, Corridor consistently demonstrated its ability and interest in working as colleagues with Portola's team. Portola now has a system that they can adapt to future contract needs in terms of required information, conditional requirements, workflow and reporting.

## Portola Pharmaceuticals

Portola Pharmaceuticals, Inc., is a biopharmaceutical company developing product candidates that could significantly advance the fields of thrombosis and other hematologic diseases. The Company is advancing its three wholly-owned programs using novel biomarker and genetic

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approaches that may increase the likelihood of clinical, regulatory and commercial success of its potentially life-saving therapies. With headquarters in San Francisco, California, Portola has clinical collaborations with other pharmaceutical companies in the United States and abroad. Portola's activities include conducting clinical studies and exercising commercialization rights to its products.

### The Business Problem in Detail

Portola's rapidly growing business called for a contract management system to enable their professionals to manage an ever-increasing number of contracts and agreements. Over a short time, contract volume had grown by 30%, and the request and approval process was manual. Obtaining internal approvals of contracts from Legal, Finance, R&D, department heads, and senior management required tracking down the authorized individual – who was often traveling – and getting a wet signature on an approval sheet. Checking the status of a contract required phone calls and emails to Legal and those involved in the approval process to piece together the contract's status.

More specifically, Portola needed a system that would allow contracts to be requested, created and approved effectively and efficiently with no room for user error. The system would also need to facilitate the negotiation of contracts with external parties using internal or external paper with full version control and a record of workflow and approvals. The executed documents would need to be stored in a central repository where they could be searched, accessed, and reported upon according to assigned permissions. Portola's specific needs included:

- **Contract granularity.** Portola's many agreement types were not mere flavors of the same recipe. Confidential Disclosure Agreements, Staffing and Search Firm Agreements, Material Transfer Agreements, and contracts covering complex clinical and manufacturing arrangements would all make unique demands on a contract management system. Depending on the contract type, the system would need different information from requestors, require different actions from creators, and route the contract to different approvers and even different departments.
- **Document assembly.** For real business process efficiency, the language and clauses required for each working contract needed to be dynamically assembled in response to information supplied by requestors and rules set by management. An important dimension to the assembly experience was to have the right information displayed during a "wizard" process that was specific to the contract being requested. What they did not want was a massive wizard form that displayed every data field, regardless of whether it was needed.
- **Simplicity of use.** Portola's contract team knew that for the system to work successfully, users would need an uncluttered interface that would function as their one-stop shop for contracts. A simple interface would be necessary to guide users down the right path as they provided information for any of the many contract types that they might need.

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Portola initially selected the option of a contract management system built on the Salesforce.com platform. This sales contract-oriented solution had size and cloud-readiness in its favor. But, as Portola worked to adapt the system to the specialized use cases of the pharmaceutical industry, it became clear that Portola's key objectives were not attainable. These objectives included robust document assembly in response to multiple conditions and document types, ready control over approval workflow, and ultra-simplification of the user interface in the interests of widespread, successful system adoption.

### Portola's Selection Process

In its renewed search, Portola benefitted from its prior market research and vendor analysis. Portola knew specifically what the organization needed from a contract management system as well as what it wanted from the company who would provide and install the system. In dialogue with Portola, Corridor distinguished itself not simply with its versatile Contract Management App for SharePoint or CM[.app]<sup>™</sup>, but also with its attention to Portola's unique business requirements. Corridor's responsiveness, creativity and collegial approach to Portola's vision was the behavior of a potential long-term partner, not just a software vendor. In particular, Corridor's "Business Release" methodology and belief in a "Crawl, Walk, Run" approach to implementation matched Portola's focus on user adoption and desire for a measured, incremental roll out of working functionality rather than a "big commit" to a sprawling, all-or-nothing software system. CM[.app]'s ease of use came through in demo after demo for the Portola team. As with several of Corridor's clients, the fact that SharePoint was already being used in-house at Portola was helpful but incidental. What made CM[.app] a winner was its robust document assembly, its simple interface, and its ability to function as well for internal workflow as for external collaboration, and its configurable metadata search and reporting on contracts.

### Outcome

Corridor implemented CM[.app] for Portola as part of Business Release 1. In addition, Corridor and Portola worked together to make CM[.app]'s simplified business user interface the single pathway for all persons— contract professionals, business users, executives, etc. — using the system. With the successful implementation of Corridor's CM[.app], Portola has achieved the following benefits:

- Portola has a contract management system that covers the contract lifecycle from creation to reporting, with both in-process and final documents stored in a secure repository. The new system is already home to approximately 3,000 documents.
- CM[.app]'s simplified user page, branded for Portola, is the one stop that Portola's contract management team and business users make on their way to requesting, approving or managing contracts. The one page is easy for general users to understand and is every user's starting point. CM[.app]'s flexibility of design means that new features can be added to the

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page – most recently, the option to add a new counterparty to the system – so that users come to trust the system as responsive to their needs.

- Help is always near at hand! Portola has its own help and FAQ page that users can access directly from the simplified user page within CM[.app]. Based on the implementation team's experience and system feedback, this help page addresses issues and common questions that are most likely to be of concern to Portola's users. Portola's own step-by-step instructions and images have been accommodated by Corridor's system and UI. The help and FAQ pages can be added to and edited by Portola's administrators at any time going forward.



- Forms for requesting contracts are rule-based to keep human error from resulting in the wrong contract being requested or contracts being created without necessary information and correct contract language. As Portola's contract volume continues to increase, the system guards against errors and missteps by a busy user community.
- For internal users, electronic approval of contracts has been a leap forward in convenience. Approvers who may be traveling can review and approve contracts remotely – even from their phones. Legal has been relieved of the “people tracking” that a manual system of circulating hardcopy and obtaining signatures had required.
- A big advantage of the system is also visibility – the ability to check status of contracts. At present, professional users can go into system and see the status of any contract in its approval cycle without calls, emails, or searches for particular people. With increased user adoption, the system will support any user being able to check contract information directly.
- Corridor put the power of the workflow in Portola's hands. Portola's system administrators can control what happens to the workflow of any contract type by checking or unchecking required approvals and by assigning users to roles associated with those approvals. A

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contract's approval paths can change dynamically in response to contract metadata; for instance, in a value-based approval path, a contract that requires approval of a department head up to a certain dollar amount may require approvals of more senior personnel such as the department SVP, the CFO or CEO at higher dollar amounts. Though Corridor Support is always ready to help, Portola's administrators can make changes to these workflows directly themselves without calls to Corridor's support desk.

- Portola has a sophisticated system with maintainability. Document permissions and rights to approve are role-based, and Portola administrators can associate personnel with a given role or department through a utility list.
- Built on Microsoft SharePoint, CM[.app] allows Portola to leverage the enterprise-class infrastructure of SharePoint – including its scalability, security and support for multiple currencies and languages.

### Change Management: The Gold Standard

The key to any successful implementation is a sound change management strategy. Portola's strategy had several key points:

- Make the system as easy to use and error-proof as possible so that people would actually want to use it.
- Create excitement and publicize the benefits that the system will deliver to its user community.
- Make the system's core features available to users as soon as possible.
- Give everyone access to training regardless of their schedules.

Portola's contract management team wanted a system that was respected by users throughout the company. To achieve this, they needed a system that accommodated their internal processes, and not one which used forms and workflows that did not fit its business requirements. The companies' respective teams worked through solutions that reflected Portola's understanding of its contracts and the relationships of its contracts to one another and to the company as a whole. Two hallmarks of the new system are the user-friendly interface and dynamic forms to help users submit requests right the first time. In both cases, Corridor was able to deliver what Portola had in mind with little change to the core form templates that come with CM[.app].

Portola also knew that that the cooperation of users of the new contract management system was the key to its success. Consequently, the implementation team used internal publicity to prepare users for the new system. Posters announced the coming of the system, displaying the new one-stop user page, all branded for Portola. Other posters displayed the workflow around the contract's lifecycle so users would understand the process being automated by the new system. Announcements explained the benefits to users of the new system, especially shorter time to contract approvals. Promotional items including branded staple-less staplers served as a

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non-verbal reminder of the move away from paper-based manual processes. Serious engagement with the new contract management system early on gave employees a chance to win more significant gifts, such as a portable battery pack for mobile devices.

With the launch of the new system, Portola's implementation team held a training open house where any user could drop in to ask questions. There were also formal trainings of one hour with food provided. A week after launch, the team held separate office hours so people could get personalized training, as needed. Users who were identified as potential power users were sent emails soliciting their feedback. And, as noted above, Portola developed extensive help materials with screen shots and other visuals, all accessible from CM[.app] business user home page.

The result of Portola's approach to change management? Users were excited to use the new system. When questions or issues arose, resources were readily available to address. There has been little, if any, push back by users or attempts to circumvent the system. In fact, the system rollout and training efforts were so successful that the internal implementation leader received Portola's "Golden Muffin," an internal award recognizing employee efforts that go above and beyond ordinary expectations.

### Lessons Learned

Portola's implementation was a good example of combining the right technology with the right vendor. This was coupled with the right change management approach deployed systematically in, what Corridor terms "Business Releases." Simple functionality was deployed first. Based on user reception and feedback, more complex functionality was then introduced. Corridor recommends this approach for two important reasons: A company can show ready "business wins" by benefiting from usable, implemented functionality right away. The experience gained by using the working system can then inform subsequent stages of the implementation and deliver heightened business value.

Here are two examples of the Business Release approach in action.

Portola has prioritized the use of e-signature before any roll out of CM[.app]'s External Email Collaboration or EEC functionality. E-signature is fairly intuitive to use and the benefits are quickly realized. External Email Collaboration, while bringing cost-saving benefits to the process of collaborating with external parties, is slightly more complex to implement. Understanding this, Portola elected to first introduce and educate its users on e-signature, with a goal of strong user adoption and immediate business benefits.

Another example of this kind of iterative process is Portola's incorporation of a value-based approval list to define whose approvals are required for contracts at particular contract values. In principle, the business case was simple: contracts with greater financial implications require approval of more senior personnel. In practice, maintaining a set of workflows to direct many contract types for approval across many departments and levels of authority proved

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complicated. The importance of a having central means to assign and manage approver roles emerged as a priority with the system in actual use. Corridor was able to work with Portola to enable a solution: an easily updateable central list of approval roles and personnel that can inform any workflow, including workflows that call for additional contract approvals by senior personnel based on increased financial commitments. Thanks to the central list approach, on the eve of launch Portola changed our internal signature authorizations and the system was able to adjust the system workflows on the fly.

### Future Considerations

With its initial deployment successfully underway, Portola is now beginning the launch of the second Business Release of the application. Having garnered feedback from users, Portola and Corridor will work together to introduce enhanced functionality and additional business value. Such functionality will include more sophisticated aggregation of financial information on related contracts and change orders, using auto-calculated amounts to guide internal approval workflows. It will also include integration with adjacent systems including Oracle Financials and ADP's HR system.

### About Corridor Company

The leading provider of a Contract Management Application powered by the SharePoint platform, Corridor Company is committed to continuously evolving our product line to meet the challenges of contract management. With a business application platform that readily provides solutions for Proposal, Contract and Supplier Management, our end-to-end solutions enable our customers to create proposal and contracts more efficiently, to manage all processes more effectively and to ensure that revenue, profit and compliance are fully optimized. Our flexible licensing model, complimentary implementation packages, and delivery options which include on premises, in the cloud or Office 365, ensure a solution tailored to fit the needs of your company.

For any questions or additional information on this implementation of our Contract Management App for SharePoint, please reach us directly at:

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