



**Fast-Growing Nonprofit
Digitizes Contract
Management to Decrease
Negotiation Times
by Half**





Introduction



Center for Sustainable Energy™

The Center for Sustainable Energy® (CSE) is a nonprofit offering clean energy program administration and technical advisory services. With the experience and streamlined efficiency of a for-profit operation, CSE leads with the passion and heart of a nonprofit. We work nationwide with energy policymakers, regulators, public agencies, businesses and others as an expert implementation partner and trusted resource.



A High-Growth Organization Faced Increasingly Complex and Time-Consuming Contract Needs

Starting out as a regional energy office in San Diego, CSE has grown into a company with over 200 employees in offices from coast to coast, providing nationwide services in California, Massachusetts, Connecticut, Oregon, New Jersey, Colorado, New York and many others.

Properly negotiating and managing contracts ensures CSE protects its IP and other proprietary information.

CSE consists of multiple matrixed teams and departments, such as a distributed energy resources team, an electric vehicle transportation team, a technology integration team, a software development team, a research and analysis team, etc.

Team designations and departments often merge or split off depending upon the needs of the organization. Many general counsels will recognize the contracting challenges CSE encountered.



Challenge



Spending 5+ hours a day on manual approval and tracking processes.

When James Strange came on-board as associate general counsel, one of his primary responsibilities became managing the various contracts generated by CSE's multiple matrixed teams and departments.

From the start, James' days were consumed with manual contracting tasks that required in-person interactions. He printed documents and walked contracts to the desks of the required approvers to obtain wet-ink signatures.

"It took a lot of actual moving around on legs and then just chasing things down,"
— James explains.



CSE needed the flexibility to negotiate with government agencies.

CSE needs a flexible platform that works with any workflow for two reasons. First, each CSE department works in a fast-paced and sometimes revolutionary field, and client needs are often unique to a certain project, or technology. This requires a high degree of attention to detail and solid organization to get it right.

Second, most CSE clients are city, county, state, or federal government agencies that follow rigid contract negotiation procedures.

“I wasn’t going to dictate to the federal government how CSE prefers to do contracting,”

– James said.



Solution



Finding Parley Pro

James was reluctant to engage with some of the larger CMS platforms after learning about other user experiences. They were also draconian about the permitted number of users for each pricing tier, which could quickly ramp up in price when adding just a few more users.

“ Some platforms seemed to work on the surface. But I learned after digging in that if you didn’t follow a preordained path in the system the workflow was easily broken. Or changing anything in the software beyond a preestablished set of features might require a support ticket or incur additional costs. Trying to add or remove users was also less than simple in many of the offerings I demo’d. What if that individual changes teams or leaves the organization? It just was very clunky.”



“After sampling what was out there, I was concerned that any solution we adopted would end up creating a whole new specific set of problems. I was desperately trying to avoid that.”

James tried a free trial of Parley Pro and discovered within three days that it was ideal for CSE. He completed about 95% of the setup and implementation on his own.

“I was able to just take off running. It was all very self-explanatory,”
– he says.



Automatically route contracts and track approvals.

On each contract, James uses the “approval tab” to add required approvers. He then sets Parley Pro to route the contract sequentially. Approvers receive email notifications to review and approve a contract.

“I don't have to print anything out. I don't have to walk it around the office. I don't have to guess where a contract is. Parley Pro tells me exactly which contract is with whom,”
—James says.

“If the contract is not moving, I can now easily reach out and say, ‘Hey, is there an issue that came up with this? Can we approve?’ No more hot potato with contracts around the office.”



Gain real-time control over contract negotiations.

Handwritten notes and long email chains are replaced with real-time collaboration in Parley Pro. James and others add and respond to questions at any time with online comments. When someone makes a note on a contract, James is instantly notified. He can immediately pop in and quickly resolve any issues.

He also doesn't have to guess where a contract may be lingering. He needs only to look at his Parley Pro dashboard to see where any contract stands in the approval queue.

“Now things happen in real-time, and I can see exactly what's happening,”
— he says.



Clients get the flexibility they need, while James retains the control he needs.

James drops the contracts clients give him straight into the appropriate negotiation or approval stage within Parley Pro. He can add comments as necessary, route contracts for approvals, then complete the deal via email if that is the client's preference. By using Parley Pro internally, all contracts remain centralized and readily accessible. CSE can still track important contract terms and milestones like expiration and renewal dates.

"Parley Pro allows for a lot of variability in how you use it. You need flexibility when dealing with legal departments,"
— James says.

"A lot of other software options didn't seem to be tailored towards attorneys or their needs. Parley Pro is,"
— James says



One system for all contracts builds consistency.

James took incremental steps to figure out a contract approval process that works for the entire organization. Then, he successfully brought each team member aboard the platform to consolidate contracts in a single location where, over time, uniformity prevails.

Now all CSE teams use Parley Pro to communicate regarding contracts and see where their contracts are in the signature queue. Team members can see contracts in their departments, and directors can download them. James adds users as needed and assigns their roles and responsibilities accordingly.

James can also customize Parley Pro's interactive contract analytics dashboard to access contract KPIs, trends, and milestones at a glance at any time.



Benefits



Save 3+ Hours every day.

James estimates that constantly updating the Excel sheet took at least an hour (often more) every day. Printing and scanning documents easily devoured another hour. Another hour went to shepherding contracts around the office and dealing with communications that weren't translated between teams.

“ James eliminated all that hassle with Parley Pro — “**Parley Pro saves me at least three hours a day,**” — he says.



Increased visibility and control.

Assigning roles allows James to grant multiple program managers and directors varied access to contracts.

“Parley Pro lets me give 20 people full admin access to a contract if necessary. We now have an elegant solution with a lot more visibility and control over who sees what regarding contracts,”
— he says.



Shore up the cracks so nothing slips through.

Parley Pro allowed James to map the physical actions completed in the office and transform them into streamlined digital workflows.

“I haven’t missed anything,” – James says.

“Everyone is happy because now they can see all their contracts, and they are automatically notified when they’re about to expire and need to be renewed.”



Benefits

Slash contract negotiation times in half and improve accuracy.

With Parley Pro, CSE executes contracts twice as fast and can process twice as many contracts. Accuracy improved significantly to save even more time.

James regained 90% of the time he previously dedicated to chasing down contracts and uploading documents, which he now devotes to more high-impact legal work.



"We're at least twice as efficient in all areas."

"Parley Pro has become a vital part of our organization,"
— James says.

**"I was able to go at my and the organization's own pace
and build a willingness to adopt a new solution. Now
Parley Pro is one of the central platforms that underscore
our operations"**



The Bottom Line

Interested in **enjoying results** like the Center for Sustainable Energy?

Ask us about Parley Pro!

Parley Pro is a modern, cloud-based contract negotiation and management platform that harnesses the power of real-time collaboration to facilitate a smooth and efficient workflow. If you'd like to explore how Parley Pro can help you, your team, and your business, request a demo to learn more.

Contact Us:

<https://parleypro.com/>