






# Healthcare provider streamlines CLM and audit processes with AI

## Company Size

2,500 Employees

## Industry

Healthcare

-  Streamlined audits for SEC and other regulatory bodies
-  All documents stored in a secure, central repository with permission-based access
-  All contract versioning, redlines, and comments in workflows

Founded in 2012, a leading healthcare provider specializes in helping mature adults stay healthy and live life more fully. Providing healthcare services that go beyond basic primary care, the organization offers patients comprehensive preventive care—including personalized wellness plans—integrated health services, and educational/social activities supporting overall health and well-being.

## Identifying a CLM system to fit changing requirements

With numerous working clinics and providers to manage, the organization’s leaders were familiar with the importance of contract lifecycle management (CLM). They had worked with multiple platforms and CLM vendors over the years to manage their wide variety

of contracts and workflows. However, over time, they realized that many of their processes were unique—requiring more than what many CLM solutions have to offer.

“We really needed a solution that would allow us to negotiate agreements, keep all document versions in one place, allow members across our many teams to comment, have visibility into our agreements, and ultimately keep us organized,” said the organization’s Associate General Counsel. “Having worked with a number of different CLM vendors over the last handful of years, we realized that they all require some modification. Nothing out of the box or off the shelf was necessarily going to work from day one.”



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**Associate General Counsel  
Large Healthcare Provider**

## Selecting a CLM platform that meets their needs

Since platform customization would be required to meet the organization's current and future CLM requirements, finding the right partner to help them achieve their goals was key. They found that partnership with Evisort.

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"With our previous vendor, if we wanted to make certain changes to the platform, we had to go through their consulting department and wait. It took anywhere from 8 to 12 weeks for them to assign a consultant, and then on top of that we paid for the consultant's time to make the product work for us.

"Evisort trained us to make our own platform modifications," said the Associate General Counsel. "As we've gotten more familiar with the platform, we're able to make some of those changes ourselves—that's what really attracted us to Evisort and their AI-powered CLM solution."

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## Wrangling redlines, comments, and versioning

The healthcare group uses standard SaaS agreements with many of their current vendors. Like many standard agreements, they are typically modified during the negotiation process, resulting in multiple redlines and edits. When documents are emailed back and forth, a stakeholder may drop off the thread, requiring creation of another thread and repeat emails. Keeping all the versions in a central, organized, and secure, repository that could be easily accessed by stakeholders was another challenge.

"As a healthcare organization that works with contracts from many insurance and IT providers, we really needed something to keep the negotiation redline process organized," said the Associate General Counsel. "Evisort consolidated all the versions in one place where we could not only see the various iterations of that agreement, but also the commentary associated with the redlines.

So, if someone looks at that agreement and says, 'All right, section one looks a little weird. What's the thinking behind that?', they can see why it was done that way in the running commentary."

## Creating contract visibility for all areas of the business

Not only is it vital for the legal team to have easy access to their contract repository, it's also critical for them to access the data within the contract at a glance—which they get through Evisort's customized dashboards. Typical information they can find using their dashboards includes recent commitments and the dollar value of those commitments, the length of the commitments, as well as the counterparties.

"As a publicly traded company, we are required to produce documentation to the Securities and Exchange Commission in connection with public filings. The Evisort platform makes that an easy process for everyone involved," shared the Associate General Counsel. "When our internal accounting team says, 'Can we see any agreements that we've entered into within the past 30 days so we can provide it to external auditors?' Evisort makes it very, very easy to do that."

According to the Associate General Counsel, the ability to easily share comments and redlines by simply tagging stakeholders in the documents has also been an invaluable, time-saving feature. Additionally, the Associate General Counsel said the legal team uses the platform to quickly search their contract repository and parse documents and clauses for changing terms and language.

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