

Hallmark Cards ANZ, a subsidiary of the world's leading creator of social expression products, embarked on a transformative journey to digitise and streamline its contract management processes. The project focused on implementing a Contract Lifecycle Management (CLM) solution tailored to the needs of its Legal and Commercial teams.

## OBJECTIVE

The primary goal was to enhance approval process efficiency, enable digitisation, and introduce e-signature capabilities. This initiative aimed to provide transparency, a single source of truth for contracts, and ensure compliance with regulatory standards.

## SOLUTION

SaaSAM implemented the Agiloft CLM solution in a phased approach, delivering a lean MVP.

Phase 1 included:

- A fully configured out-of-the-box CLM system tailored to Hallmark's operational needs.
- A streamlined approval workflow with auto-approvals and conditional finance approvals.
- Secure user access setup using role-based permissions and SAML authentication.
- Initial data migration of essential contract records.

A standout customisation was the replication of Hallmark's P&L spreadsheet within Agiloft. This required extensive use of calculated fields to mirror financial benchmarks, accommodating unique reseller requirements. Though not part of the original scope, this enhancement was collaboratively scoped and delivered with a modest 5% budget overrun.

## BENEFITS

Hallmark achieved measurable improvements in contract management through Agiloft:

- **Faster Turnaround:** Auto-approvals cut contract delivery from days to under an hour.
- **Simplified Initiation:** Replaced Excel and paper forms with a streamlined digital process.
- **Centralised & Secure Storage:** DocuSign integration and a unified repository improved access and compliance.
- **Smarter Oversight:** Automated tracking enabled timely renewals and reduced missed obligations.
- **Efficiency & Risk Reduction:** Reduced manual work, improved consistency, and lowered legal risk.

## AT A GLANCE

### CHALLENGES

- Manual contract storage in local drives and SharePoint
- Complex P&L requirements not in original scope
- Budget constraints for MVP implementation
- Need for complex conditional finance approvals

### BENEFITS

- Centralised digital repository with secure access
- Custom replication using calculated fields in Agiloft
- Configured streamlined workflows with auto-approval logic
- Future proofed solution for subsequent enhancement phases



## CONCLUSION

Hallmark PM

Core CLM delivered on time and budget; collaboration enabled custom P&L logic and laid groundwork for future enhancements. Phase 2 discussions are underway.

For more information on how SaaSAM can streamline your contract management and help achieve your business goals, visit SaaSAM Group at [www.saasamgroup.com](http://www.saasamgroup.com)