



# How a Regional Water Authority *Modernized Contract Management with Automated Workflows and Centralized Oversight*

**Overview:** A large regional water management organization in the southeastern United States sought to modernize its contract lifecycle processes. Facing growing complexity, manual workflows, and limited visibility into agreements, the organization implemented a centralized contract management platform integrated with its existing tech stack.

The result has proven to be a streamlined, rules-driven process that has improved efficiency, strengthened compliance, and enhanced contract visibility across departments.



## Challenges

As a public utility organization managing a high volume of contracts, the utility company required a solution that could support both operational efficiency and regulatory accountability.

### Key challenges included:

- **Manual, inconsistent document creation**  
Project managers lacked a standardized way to generate agreements, leading to inconsistencies in terms and conditions.
- **Limited control over contract language**  
Procurement and legal teams needed a centralized way to manage and govern approved contract language.
- **Inefficient review and approval processes**  
The absence of structured workflows made it difficult to track changes, approvals, and ownership throughout the lifecycle.
- **Lack of visibility into contract status and performance**  
The organization needed better insight into contract timelines, deliverables, and compliance milestones.
- **Disconnected systems and document storage**  
Contract data, documents, and vendor information were spread across multiple platforms, including SharePoint and financial systems.

## Solution

To address these challenges, the organization implemented a comprehensive contract lifecycle management (CLM) platform designed to standardize processes and integrate with existing systems.

### Key capabilities included:

#### Rules-Based Authoring

A guided, wizard-based approach has enabled project managers to generate contracts by answering structured questions, quickly applying approved terms and conditions.

#### Centralized Language Management

Procurement and legal teams have gained the ability to create, manage, and update standardized contract language, promoting consistency and compliance across all agreements.

#### Redlining and Audit Tracking

Built-in version control and redlining functionality has allowed users to track edits, comments, and approvals with comprehensive visibility into who made changes and when.

#### Workflow Automation

Custom sequential and parallel workflows were configured to streamline approvals, virtually ensuring contracts moved efficiently through defined review stages.

#### Integration with Existing Systems

- **DocuSign and Adobe Acrobat Sign** for electronic signatures.
- **Microsoft Entra (SSO)** for secure access and user provisioning.
- **SharePoint** for finalized document storage and records retention.
- **CGI Advantage** for vendor and contract data synchronization.

#### Contract Lifecycle Visibility

Dashboards and reporting tools have enabled teams to track contract status, timelines, and bottlenecks in real time.

#### Compliance and Expiration Tracking

Automated notifications and checklist-based performance tracking have virtually ensured deliverables, deadlines, and renewal dates were not missed.

## Results

Following implementation, the organization has established a more structured and scalable approach to contract management.

### Key outcomes included:

- **Improved consistency in contract creation**  
Standardized templates and rules-based authoring have reduced variability and risk.
- **Enhanced operational efficiency**  
Automated workflows have minimized manual handoffs and delays.
- **Greater transparency and accountability**  
Real-time visibility into contract status and lifecycle metrics have improved oversight.
- **Stronger compliance and risk management**  
Centralized language control and audit tracking have supported regulatory requirements.
- **Seamless integration with existing systems**  
Alignment with SharePoint, e-signature platforms, and financial systems has reduced duplication and improved data accuracy.
- **Better contract lifecycle management**  
Proactive alerts and performance tracking has helped ensure obligations and key dates are met.

## Conclusion

This implementation demonstrates how public sector and utility organizations can modernize contract management by centralizing processes, standardizing workflows, and integrating critical systems. By adopting a structured, technology-driven approach, organizations can improve efficiency, reduce risk, and gain greater control over complex contract environments.

CobbleStone Software offers award-winning SaaS (web-enabled) and on-site (deployed) contract management software solutions to assist companies in boosting revenue, reducing costs, increasing configurability, reducing friction, and mitigating risk.

CobbleStone's contract management software suite – CobbleStone Contract Insight - enables organizations to effectively and efficiently manage their contracts through the contract lifecycle.

**Click here** to book a free demo of CobbleStone Contract Insight today!