Salesforce Contract Request Process

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CHAPTER

1

Contract Review Process

Bright Horizons is focused on increasing the number of clients it serves every year and on retaining existing clients for many years. Each client requires a contract detailing the types of services that are being provided as well as the terms and conditions for those services. Even after the initial contract is signed, the client may make modifications throughout the term of the contract, or require a new contract when the contract expires. Hundreds of contracts are therefore requested and completed each year.

When Bright Horizons was a smaller company, this process was largely managed by one or two people who were able to keep track of the contracts being requested and ensure that they were completed in a timely fashion. However, as the business has grown, the number of contracts needed has also grown dramatically, necessitating some form of technological solution to the problem of organizing the requests, and managing them efficiently and accurately.

To manage this process, Bright Horizons created a Contracts Request Process workflow within Salesforce, an application which was already being to store information about clients and their services. The workflow provides a central location to submit and review contract requests, and to track them from the initial request to the time they are signed. It also provides automatic notifications, alerting users to new actions being taken on their requests. The Contracts Request Process workflow serves as a record of the history of the contracts process, so that if anyone who worked on it is out of the office, someone else can easily see what has been completed so far. It makes it easier for everyone to monitor the progress and completion status of each contract request, which improves efficiency and reduces unnecessary delays in completing contracts.

1.1 Benefits of the Salesforce Process

The Salesforce Contract Request Process workflow was designed to help members of the Client Services (CS) and Client Relations (CR) teams at Bright Horizons with their contract needs and to improve the turnaround time from initial request to completed contract. The workflow reflects the different needs of the two teams. Client Services Directors (CSDs) will usually be requesting new contracts for new clients. Client Relations Directions (CRDs) will typically need contract renewals when a client's contract has expired, and contract amendments when clients make changes to their services.

The workflow will make it clear what information needs to be provided in order to request each type of contract. It improves the efficiency of the contract review process by reducing the number of emails being exchanged over each request. It also creates a central location for information about the contract being requested and in-progress drafts, allowing everyone involved to access this information quickly and easily. Lastly, the workflow offers many reporting options, allowing users to keep better track of their outstanding requests and tasks.

1.2 Understanding the Salesforce Contract Request Process

The Salesforce Contract Request process workflow exists within the Salesforce application already in use at Bright Horizons. Salesforce currently allows the CS and CR teams to enter a substantive amount of client-related data into each client record, including information about the client and the services Bright Horizons provides to those clients, the individual employees at client companies who manage and make decisions about our services, and records of communications with clients.

The Contracts Request workflow is one part of the client record. From the Contracts Request tab, CSDs or CRDs are able to select a request form corresponding to the type of contract they require. Each form is different, depending on the type of contract being requested. Once the form is completed, it is submitted into the workflow. The workflow moves the request through a series of stages that cover the drafting and review process. At each stage, the appropriate users are automatically notified about any outstanding action items and about any change in the contract's status. This automatic notification and the ability to see action items in the Salesforce dashboard and reports eliminates the need for everyone involved to keep track of the status of each contract in their own Excel spreadsheet or Word document.

A new request is submitted by a CSD or CRD. It is assigned to the Contracts Manager, who reviews the request and determines if it is complete enough to begin work, or if more information is required. Once the Contracts Manager is satisfied, the Contracts Manager assigns an attorney to review the contract. When the attorney has completed the contract, the draft is uploaded and the request is assigned to the CSD/CRD for review. After the CSD/CRD is satisfied, the contract is sent to the client to review. When the client approves, the CSD/CRD assigns the request back to the Contracts Manager to complete the signature process. When the contract is signed, the Contracts Manager marks the request as finalized, and the workflow is completed.

1.3 Overview of the Contract Request Process

Before using the Salesforce Contract Request process workflow, it's important to understand how a contract moves through every stage from the initial request to a fully-executed contract (see Image A).

Step 1. The contract request is created in Salesforce and submitted to a Contracts Manager.

Step 2. The Contracts Manager reviews the request, and does one of the following:

- **a.** Rejects the request, and returns it to the person who made the request (the "owner") with a request for more information.
- **b.** Completes a draft of the contract, and sends it to an attorney for further review before it is sent to the owner. This will happen when a request is very complex, or if a client asks for termination for convenience, or asks for a change to the non-business terms (such as indemnification).
- **c.** Completes a draft of the contract, and sends it to the owner for review.

Step 3. The owner reviews a draft of the contract and does one of the following:

- **a.** If the contract needs no changes, the owner sends the contract to the client for review.
- **b.** If the contract still needs work, the owner rejects the draft, sending it back for further changes.

Step 4. The client reviews the contract, and does one of the following:

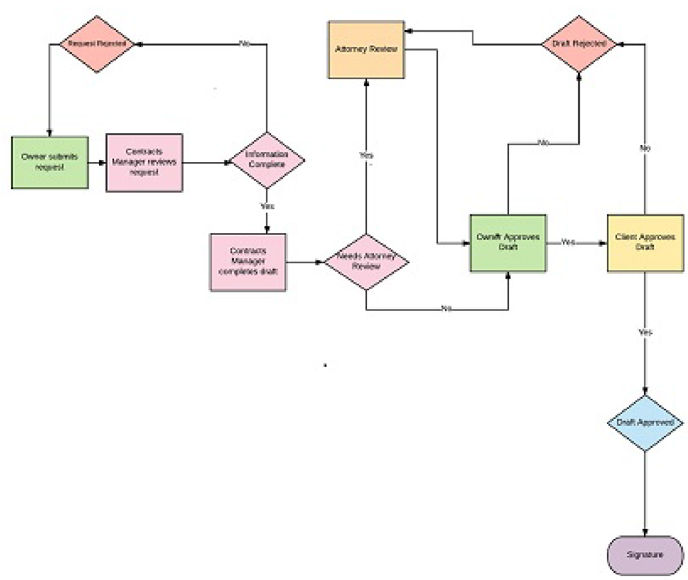
- **a.** Agrees to sign the contract.
- **b.** Returns the contract with redlines, comments, questions, and/or suggested changes.

Step 5. If the client agrees to sign the contract, the owner approves the request for signature, and the contract is processed for signature.

Step 6. If the client wants to make changes, the contract is sent back for further review.

- **a.** If the revisions are simple, the Contracts Manager can make the changes and return it to the owner and client for approval.
- **b.** If the request is complex, an attorney will need to review the changes. At this stage, further discussion between the owner and the attorney, or between the attorney and the client, may be necessary.
- **c.** When the client agrees to the final draft, it will be processed for signature.

Image A. Contract Review Process



CHAPTER

2

Requesting a Contract

2.1 Creating a New Contract Request

When you are ready to request a new contract for a client, you will need to create a new contract request in Salesforce. The first thing you will do is create the contract request and select the type of contract you require.

Step 1. Open Salesforce and navigate to the client's page.

Step 2. Select **Contract Requests** from the tabs at the top to go to the Contracts Requests section (or scroll down until you find it).

Step 3. Click **New Contract Request**.

Step 4. Select the type of contract you want from the Select Contract Request Record Type menu. Choose the contract that corresponds to the type of service you are requesting to add or change.

Step 5. Click **Continue**.

2.2 Completing a Contract Request

Once you have selected the correct Contract Request type, you will want to fill out the correct sections for your request. This form is where you will enter all the necessary information about the client and the contract. The form has several sections; you will only need to complete some of them.

The fields with a red bar next to them are required fields. You can't submit the request until these are completed. These include:

- Business Contact
- Date Requested By
- Request Type
- Related Account
- Contracts Manager

Step 1. Enter information into all relevant fields, including the required fields.

Step 2. Enter any necessary information under Contract Details.

Step 3. Enter the program details for the contract you're requesting.

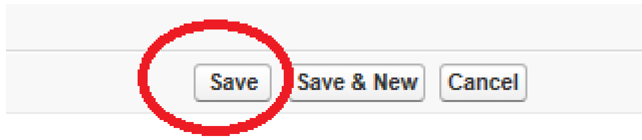
Step 4. For new contract requests, complete the first section only.

Note: You do not need to complete the Amendment/Renewal section for a new contract request.

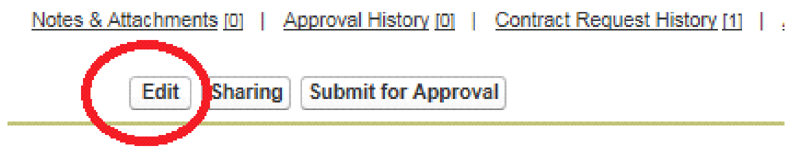
Step 5. For a contract amendment or renewal, complete the Amendment/Renewal section only. Be sure to indicate all changes that you want made to the client's services in the correct "Changes to" section.

2.2.1 Submitting the Contract Request

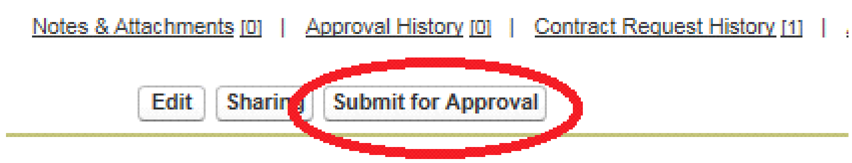
Step 1. When you've completed your request, click **Save**.



Step 2. Review your contract request. To make further edits, click **Edit**.



Step 3. When your request is complete, click **Submit for Approval**.

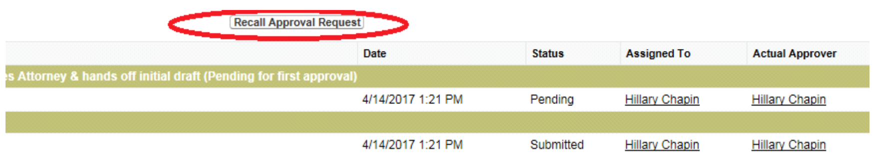


Caution	***If you do NOT Submit your request, it will NOT be sent to a contracts manager for review.***

2.2.2 Editing a Contract Request

*Note: When you have finished editing the request, you must click **Submit for Approval** again.*

Once you submit the request, you won't be able to edit it. If you realize after submitting the request that you need to make changes, click **Recall Approval Request**. This will allow you to recall the document so you can edit it again. Enter any comments into the text box. Then click **Recall Approval Request** again.



2.2.3 Submitting Multiple Requests

The current Salesforce request form does not have a form for a multi-service contract requests; each service must be requested separately.

Tip: For example, if a client wants a Master Service Agreement with a Statement of Work for each service, or, if they want a Center contract and also a BUCA contract, you will need to create two requests.

In order to request multiple contracts for the same client, you will need create a separate request for each contract.

Also, to request one contract with multiple services, you will probably need create a separate contract request for each service requested, depending on how complex the request is.

- If you are creating a request for a new contract, enter one request for each new service needed.
- If you are doing a simple amendment, you can just create one request.
- If the request requires complex changes to more than one program, then you will need to create two requests, and indicate that they are Bundled Requests.

CHAPTER

3 Completing the First Draft

3.1 The First Draft Process

Once you have submitted your request, the Contract Manager will receive an email that your request has been submitted. The next step of the process is for the Contract Manager to review your request and create a draft of the contract based on the information you have provided.

If you have not provided enough information, the Contracts Manager will reject your request and let you know which information is missing. You will need to edit the request and then submit the request again.

The Contracts Manager will create a draft of the contract, and assign an attorney to review the draft. If the draft is complex, this will be a member of the Legal team. For simple requests, the Contracts Manager will also be assigned as the attorney so that the draft can be returned to you quickly.

When the document is sent to the attorney for review, you will receive an email from Salesforce that lets you know it has been assigned, and who it is assigned to.

Image A. Email from Salesforce

Your request for Excell Corporation's Back-up Request contract has been assigned by Hillary Chapin to Attorney Andrea Zercie. A draft is being worked on.

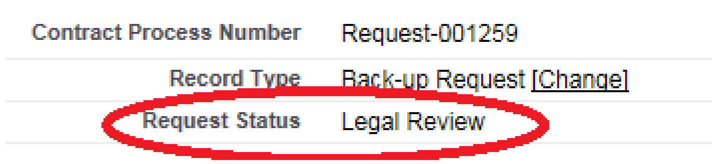
When the draft is ready for your review and forwarding to the client it will be attached to the record in Salesforce and you'll receive an email notification.

Here's a link to the Contract Request in Process:
https://brighthorizons.my.salesforce.com/a2L370000006Vrl

Thanks,

The Salesforce Team.

When you follow this link, you should be able to see the name of the Lead Attorney, and that the status has changed to Legal Review.



You can also look under Notes & Attachments to see the draft contract and any other documents that have been uploaded so far.

CHAPTER 4

Reviewing the Contract Draft

4.1 Reviewing the Draft

When the Legal team has completed the draft, they will upload the contract draft and any relevant documents into Salesforce, and approve the request. This will re-assign the request to you in Salesforce. At this point, the draft is ready for your review and, if you are satisfied with it, the client's.

You will receive an email telling you that the draft is ready for your review, and providing you instructions with what to do next.

Read the instructions carefully.

When you receive this email, you should do the following:

Step 1. Follow the link in the email to the contract request.

Step 2. View/download the document.

Step 3. Review the document.

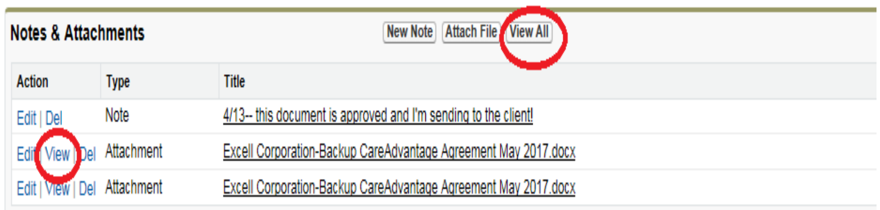
- **a.** If you are not happy with this draft and would like to make changes, then you should reject the request.

Note: Do not approve the request at this time.

b. If you are happy with this draft, send it to the client for review.

4.1.1 Viewing and Downloading a Contract Draft

You can view and download documents from the Notes & Attachments section. There are three ways to view the documents.



- Select **View**, next to the document you wish to open. This will open a dialog box asking you if you want to Open the document or Save the document to your computer.

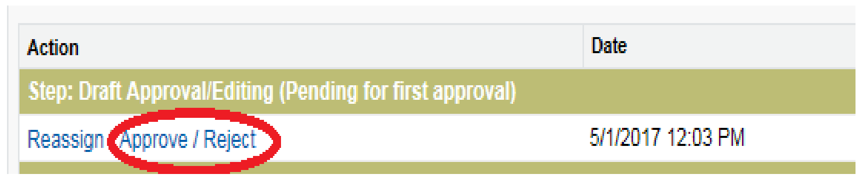
  More info:
  If you select **Open** it will not be automatically saved; select **Save** if you want to save it to your computer.

- Select **View All**, which will open up a window and show you all Notes and Attachments for this request. This is most useful if there are a lot of documents to view.
- Click directly on the name of the file you want to open. Click **View File** to open or save the document.

4.1.2 Reviewing the Draft

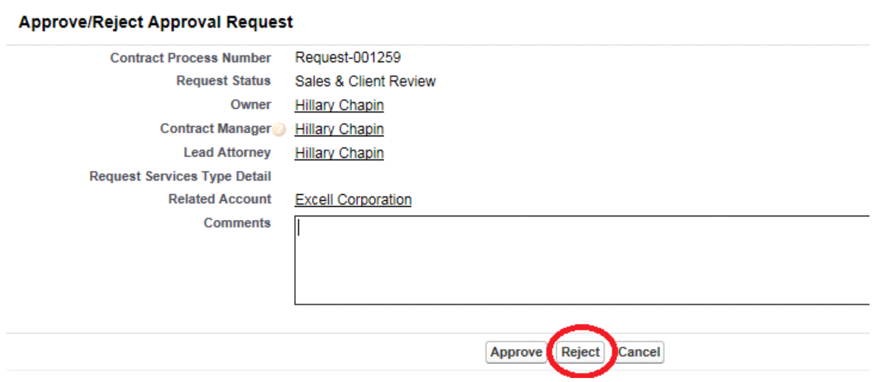
Once you have had a chance to review the draft, you will either reject the draft or send it to the client. If you want to make some changes to the draft, or if there is something you want to add or remove before you send to the client, then you should **reject** the draft.

Step 1. Go to Approval History and click **Approve/Reject**. This opens up the Approve/Reject Approval Request screen.



Step 2. Under Comments, provide your reasons for rejecting the draft and include any changes you want to make.

Step 3. Then click **Reject**.



This will send the draft back to the attorney, who will either make the changes you requested, or contact you to discuss further. When the second pass at the draft is complete, it will be sent back to you for review.

4.1.3 Sending the Draft to the Client

When you are satisfied with the contract draft, you may then send it to the client for their review. This stage does not occur in Salesforce; send the contract to the client by email or by the client's preferred method.

The status in Salesforce at this stage is "Sales and Client Review." This next stage covers both your approval of the contract and the client's.

Do not approve the request at this time; wait until the client is satisfied with the contract and is ready to sign.

CHAPTER

5

Client Review of the Contract

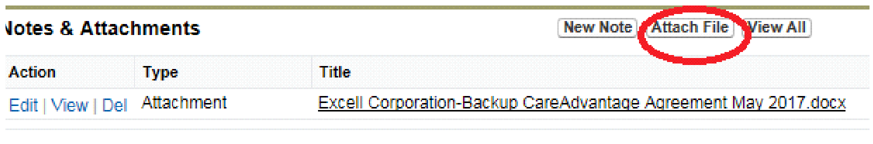
5.1 Client Review

In the next stage of the process, the client will review the contract. The client will either reject the draft (and have comments, questions, or redlines), or they will accept it and approve it for signature.

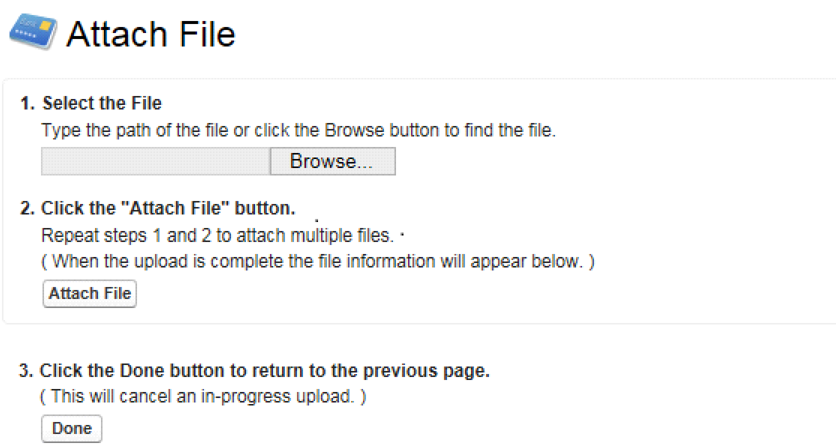
If the client rejects the draft, you will need to reject the request in Salesforce. This will send it back to the attorney to review the client's changes, edits, and questions.

5.1.1 Client Rejects the Draft

Step 1. If the client has returned a draft with edits or comments, go to Notes and Attachments and select **Attach File** to upload the client's draft.



1. Click **Browse** to select the correct file on your computer.
2. Click **Attach File**.
3. When the file has been attached, click **Done**.



More info: If you have successfully uploaded the file, you will see a message that says "You have just uploaded the following file."

Step 2. Once you have uploaded the client's redlines, then you should reject the draft.

Step 3. Go to Approval History and click **Approve/Reject**.

Step 4. Under Comments provide your reasons for rejecting the draft and include any additional information you have.

Step 5. Click **Reject**.

Tip: If the client hasn't provided an edited document, but instead sent you questions or comments in an email, you can copy the text of the email into the comments section when you reject the file.

Once you reject the draft, the status will be changed back to Legal Review, and the attorney who worked on the initial draft will either make the changes you requested, or contact you to discuss further. When the second draft is complete, it will be sent back to you for review.

When the attorney has finished work on the draft, he or she will attach the new draft and approve the request again.

You can then send the new draft to the client. This process will be repeated until the client is satisfied with the draft and is ready to sign.

5.1.2 Client Approves the Draft and is Ready to Sign

Once the client is satisfied with the draft and is ready to sign, approve the request in Salesforce so that the Contracts Manager knows it is ready to sign. If the client has returned a signed copy to you already, upload that to the Salesforce request using the instructions for attaching documents, and then approve the request.

If you have not already done so, edit the request and fill in the following required fields. Use these fields to indicate which party will sign first, and to indicate if the client is willing to use DocuSign.

- Who Signs First
- Using DocuSign for Signature
- Ultimate Signee

Note: These fields must be completed before the document can be approved for signature.

5.1.2.1 Approving the Request

In order to indicate that the contract is ready to sign, approve the request in Salesforce.

Step 1. Go to Approval History and select **Approve**.

Step 2. Enter any comments and click **Approve**.

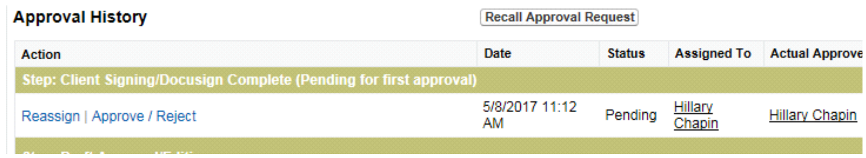
Note: If the client has any special requests for the signature process, indicate that in the comments.

More info: If you get the error message **Validation Error While Saving Record**, use your back button to go back, and then go back to the request and complete the required fields. Then approve again.

Tip: The Required Fields are: Who Signs First, Using DocuSign for Signature, and Ultimate Signee

Result of this task: Once you approve the document, the Request Status will change to “Draft Approved/Signature Pending” and in the Approval History, you will see “Step: Client Signing/DocuSign Complete.”

Note: If for some reason you do not want the document to be signed at this time, click **Recall Approval Request.**



5.1.3 After the Document is Approved

Once you approve the document, an email will be sent to the Contracts Manager that says the document is approved and ready for signature.

The Contracts Manager will process the document for signature, typically through DocuSign (the electronic signature application) or by whatever means the client has requested.

When the contract is signed, the Contracts Manager will approve it in Salesforce, and you will receive an email from Salesforce letting you know what to do next. You will also receive a copy of the signed document from the DocuSign application.

At this point, the contract request in Salesforce will be marked as Finalized, and there shouldn't be anything else you need to do! This contract request has been completed, and should not be needed again except for reference.

CHAPTER

6

Frequently Asked Questions

6.1 Frequently Asked Questions (FAQ)

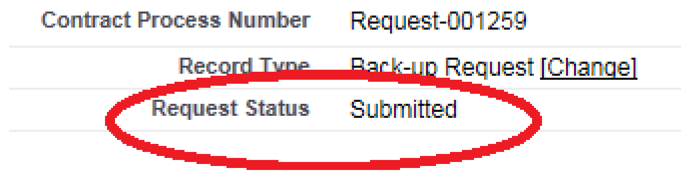
Q. I need to modify a BUCA contract to add College Coach. Do I need to create two requests for this?

A. It depends on how complex the requests are. If the request is simple, such as "The client wants to downgrade their BUCA uses and use the revenue for College Coach," then you can probably just create one request. Create a College Coach request so that you can add all of the program details for College Coach, and then indicate in the Notes that the client wants to downgrade their Annual Uses.

If the BUCA request requires more complex changes to BUCA, then you will need to create two requests, and indicate that they are Bundled Requests.

Q. I created a request but no one has worked on it yet. Why not?

A. Make sure you have clicked Submit for Approval. This actually submits the request to someone to work on. The request status should stay Submitted. If it says New instead of Submitted, you'll need to click the Submit for Approval button to submit the request.



Q. I tried to Approve the request for signature but I got an error message. What does that mean?

A. Make sure the following fields have been filled out. These fields are required before the draft can be approved for signature.

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