

# Case Study

## Investment Bank Improves Ability to Manage Contracts Globally



### Challenge

- Local offices of a global investment bank were **managing contracts in a siloed manner**
- Inconsistent processes were creating **compliance concerns** and making it **difficult to view relationships and transactions on a global basis**
- The investment bank was also looking for ways to **reduce its contract management budget without losing resources**



### Solution

- Integreon formed a team, which included the client's former contract management administration who were hired as "vendor staff"
- The team, was trained on client compliance and software and provides all services on site with full client security measures in place
- Quality is managed through ongoing deliverables, status updates, feedback, and best practices.
- Workflow is monitored and audited on an ongoing basis



### Impact

- Integreon provides a **full-service contract management function** that has been **globalized, secured, quality-checked, and documented** with a vendor staff that is not included in the client's headcount
- The client achieved **significant cost savings**
- The investment bank benefitted from Integreon's contract management expertise through **streamlined processes and improved efficiencies**