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SYMPLR

From *The Flintstones* to *The Jetsons*: How symplr Used Contract AI to Bring the Business into the Future

symplr

"Using Pramata to build AI Agents has reduced the time spent on specific processes and tasks from multiple days to as little as a minute. You can't overstate the impact of this on the legal team's productivity and the rest of the company's ability to do their jobs."

- Foster Sayers, *Vice President of Legal Operations, symplr*

symplr is the leader in enterprise healthcare operations software and services. A first of its kind, the symplr Operations Platform unifies back-office operations by creating a more cohesive and connected approach to solving operational challenges. By replacing dozens of vendors and hundreds of point solutions, the symplr Platform provides the critical capabilities healthcare organizations need to achieve long-term success.

Headquarters: Houston, TX
Industry: Technology

symplr's Legal Ops team built its own AI Agents to eliminate escalations, provide transparency and self-service, and transform the larger business

Healthcare technology company symplr provides leading solutions for healthcare operations—spanning from healthcare IT to HR, clinical providers, payers, and more. While its software gives customers cutting edge modern technology, internally, symplr faced significant challenges due to its growth by acquisition and the challenges that created for its contract management processes.

With inefficient intake procedures, the need for ongoing manual research, and constant escalations from internal stakeholders, legal team members often found themselves spending as much time managing and researching requests as they did on doing the work. This was a major issue for symplr, as it continued to grow both organically and through acquisitions, which only led to more complexity and challenges with contract management.

Foster Sayers, Vice President of Legal Operations at symplr, recognized the need for a radical change, starting with something as seemingly simple as automated contract requests and assignments. "When I joined symplr, we had Pramata but the company had not yet implemented the contract request workflow," Sayers explained.

"Instead, we were still using case objects in Salesforce, which isn't an optimal approach when you have a platform like Pramata with great capabilities at your disposal."

"There was no automation in case assignment," Sayers continued. "There were issues with duplicate requests, and there was constant back and forth because Legal was unable to tailor the forms and workflow to ensure they got all the information they needed at the time of the request."

This inefficiency created significant delays in deal cycles and made it impossible to track turnaround times or maintain consistent service level agreements between the legal department and other teams. Luckily, Sayers was already a well versed Pramata super-user who had implemented the solution and seen spectacular results at previous companies when he joined symplr in 2023.

As the new VP of Legal Operations, Sayers quickly got to work solving the company's most pressing contract management challenges, and then took things even further with advanced generative AI capabilities.

The problems with legacy systems

Inefficient intake and constant escalations

Before Sayers' arrival in his new role at symplr, the healthcare technology company's contract management process was plagued with inefficiencies that had ramifications far beyond the legal team. One of the most pressing challenges was the legal department's intake process, which lacked automation and transparency.

"People would submit a request to Legal using the case object in Salesforce and the result was constant escalations because nothing was automatically assigned and no one had visibility into where their request was sitting," Sayers said.

"People understandably wanted Legal's attention on their requests, but it made everything feel like an emergency and it created a negative coefficient on Legal's productivity," Sayers continued. "If you have to confirm the status of a contract negotiation with the Chief Legal Officer, the Director of Contracts, the Account Executive, and their Sales Manager—that's time you're not doing work."

On top of those ongoing contract request challenges, symplr found it difficult to manage contracts across multiple legacy entities, each with their own templates and terms, as the company grew rapidly through acquisitions. This made it difficult to quickly access and understand critical contract information, especially when supporting customers or preparing for renewal discussions.

When Sayers stepped into his new role of VP, Legal Operations at symplr, one of his first orders of business was to get Pramata's contract request workflow up and running. Doing so immediately solved the most pressing pain points that the legal team and others across the business had historically faced.

"Now we have automations that assign the request to a legal team member as soon as it is submitted."

We have the ability for people in other departments to self-service the creation of dozens of different contracts that previously required a human to create. We have the ability to demonstrate our turnaround times and prove we're maintaining our SLAs," Sayers explained.

The new system also provided enhanced visibility into contract statuses, significantly reducing the constant escalations that were previously draining the legal team's productivity. Implementing this functionality within Pramata was transformative, and created immediate improvements in efficiency and significantly reduced the turnaround time for contract requests. But Sayers didn't stop there. As a tech-savvy Legal Ops leader, he quickly pioneered Pramata's generative AI agent capabilities, with even more impressive results.

There's an agent for that!

Custom AI agents instantly answer common contract questions

With intake requests automated, Sayers set his sights on using Pramata's Contract AI capabilities to build AI agents for specific, common contract questions and requests across the business.

"When I joined symplr in 2023, people described our commercial contracting function as being in the stone age like the Flintstones, because everything was manual. Now, it's literally like The Jetson's. You push a button and you know whether you need an NDA or not. You push another button and it creates one. People are over the moon with Pramata and our Gen AI agents because it's so transformative to what they do every day."

- Foster Sayers, *Vice President of Legal Operations, symplr*

"A lot of times when you support your customers, there's information that's in the contract—which is the full embodiment of your commercial commitments—that's important to understand for supporting the account or structuring the next deal, but it's not in our business operating systems," Sayers said. "So, I created AI agents to address these routine challenges and help people quickly get answers to those questions that previously they'd have to ask Legal for help with, and would involve time-consuming contract research."

Sayers took a thoughtful approach to creating these AI agents, focusing on the specific needs of different teams within the organization.

For the Sales team, he created agents that could quickly answer common questions like whether an existing master agreement or NDA would sufficiently cover sharing a SOC 2 report with a customer's IT team.

For Customer Success, he developed agents to identify renewal dates, termination provisions, and price escalation terms.

For Legal, he built agents that could analyze limitations of liability provisions against the company's playbook.

These are just a few examples of dozens of AI agents Sayers built for the symplr team. And the results speak for themselves!

Requests to Legal to explain contracts dropped dramatically as teams across the organization embraced these powerful new Gen AI agents to self-service many of their everyday needs. Contract requests that previously would have taken days to complete, were completed in a matter of minutes, if not seconds. Using AI agents eliminated "dead time" where internal clients waited on their request to make it through Legal's queue.

With Pramata's Gen AI agents, symplr employees can now do everything from checking for NDA coverage and generating a new NDA instantly, to understanding price increase provisions across multiple agreements from various acquired entities. Users also get a recommended standardization approach and talking points for customer discussions along with the AI output.

Sayers made sure when creating the AI agents that they would provide reasoning and analysis to help users fully understand what was in each contract and provide the necessary context for decision making.

Of course, even the best technology will fail if no one uses it. But this isn't a problem for Sayers and his symplr team. "My goal was to increase user sessions by 20 percent, year over year," Sayers explained. "When I took a snapshot of usage from a 90-day period early last year and compared it to this year, I had beat my goal by 10 times over. Pramata user sessions were up 200 percent, and the Gen AI agents were definitely a large driver of that adoption."

Requesting a SOC 2 report *before* Gen AI agents vs. *after*

BEFORE
Time: 2+ days of manual Legal research to respond

1 Customer requests a SOC 2 report from their account executive

2 AE submits a request to legal to ask if they can provide it
(up to 2 days of waiting)

3 Legal researches existing contracts to see if their confidentiality provisions cover providing this information
(more days of waiting)

If yes, the business authorizes sending a SOC 2 report to customer.

If not, Legal needs to manually draft a new NDA *(more time waiting)*

AFTER
Time: 30 seconds to 5 minutes - self-service and Contract AI

1 Customer requests a SOC 2 report from their account executive

2 AE uses the Confidentiality AI Agent to learn if the current agreement provides the right coverage.

If yes, the business will send the SOC 2 immediately.

If not, they self-service draft a SOC 2 compliant NDA using the workflow in Pramata *(5 minutes)* and send it to the customer for signing.