



MediTract Customer Webinar

July 1, 2021



How This Session Works

We're broadcasting live from many places using GoToWebinar.

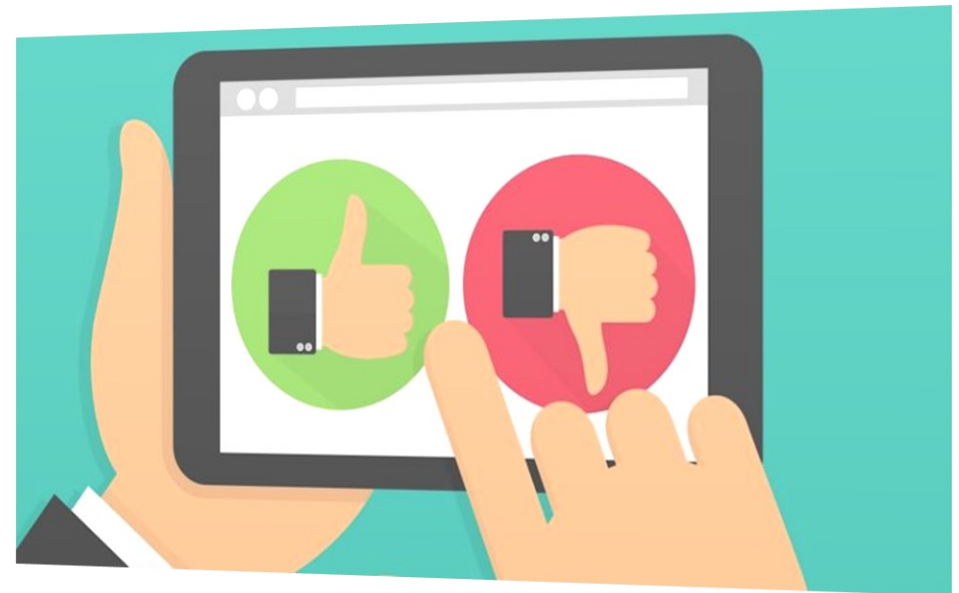
All lines are on mute to minimize background noise.

Feel free to ask a question at any time using the GoToWebinar question box or by emailing askbj@symplr.com



Your Opinion Matters

- We'd like your feedback on what you thought of today's session. Your insights help us improve.
- Stay on for a very brief survey after today's session, which will launch in a pop-up screen once the webinar has concluded.
- Again, you can comment or ask anything by typing in the **“Questions”** box as well.



Today's Topics

Introductions

Executive Update

Product Roadmap Details

Customer Excellence

What's Next

Q&A



Speaker Introductions



BJ Schaknowski

Chief Executive
Officer



Nathan Hershkowitz

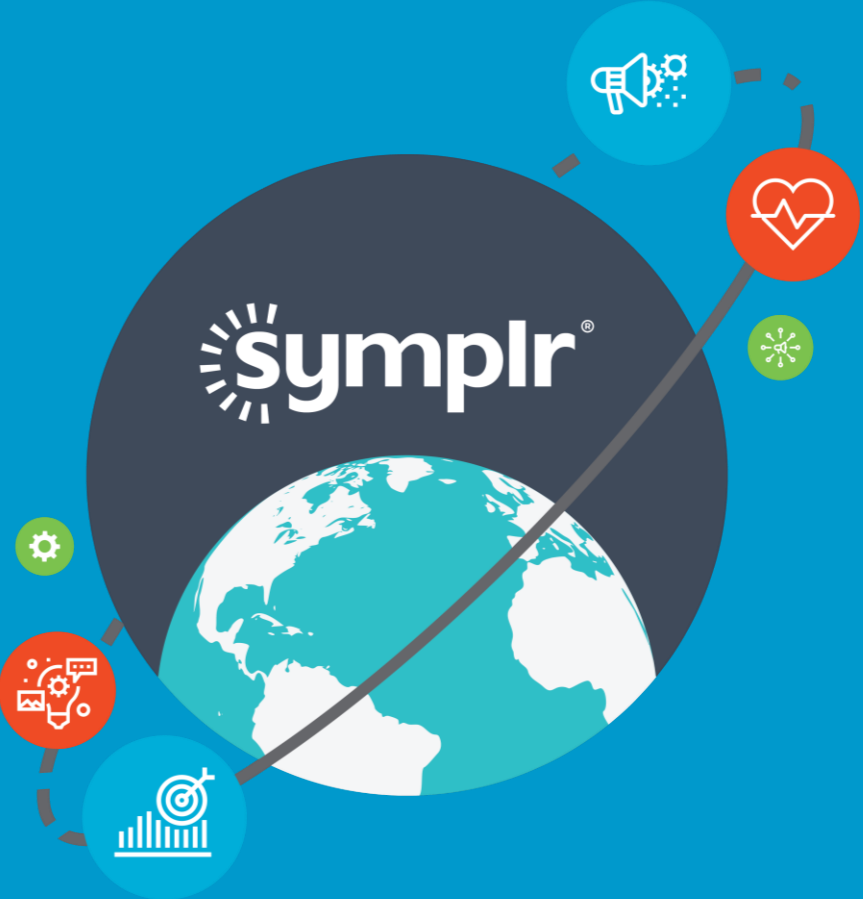
Director, Product
Management



Bill Christy

SVP, Customer
Excellence

Progress Update



Accountability to You

Our Last Conversation

What We've Accomplished

Engagement from symplr Senior Leadership Teams

Targeted outreach and communication forums from our symplr Executive and Senior Leadership teams, such as today's meeting

Information on our processes and commitment to delivery

Open and transparent updates on project status, delivering updated actionable plans with an eye toward fulfilling all commitments

Expand resource investment and focus on supporting customers

Expanded Customer Success engagement model across our customer base; Actively partnering with our Professional Services team to ensure appropriate engagement

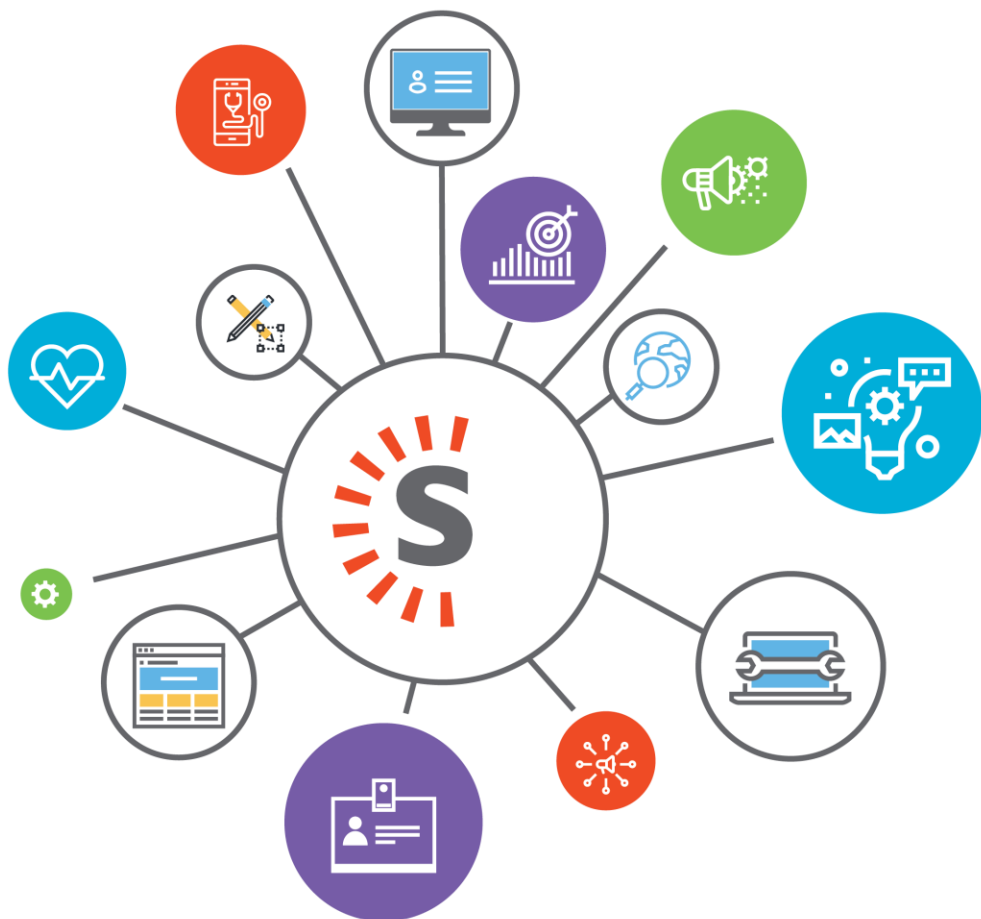
More 1:1 communication opportunities

Increased communication to individual customers on CLM 2.0, included more than 40+ personal touchpoints, to better articulate symplr's goals



Product Roadmap

Listening to You



symplr is leaning in!

Collaboration Board

tactical product prioritization and design decisions

 Launched
June

Advisory Board

guide the roadmap strategy and align to industry demands

 Launched
June

Ideas Portal

gather feedback from customers re: product enhancements

 Taking
Flight Q4

Improvements



Alignment

Close gap with Classic



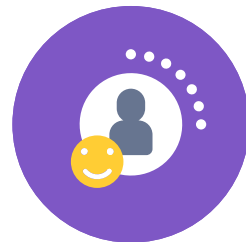
Education

Webinar Series



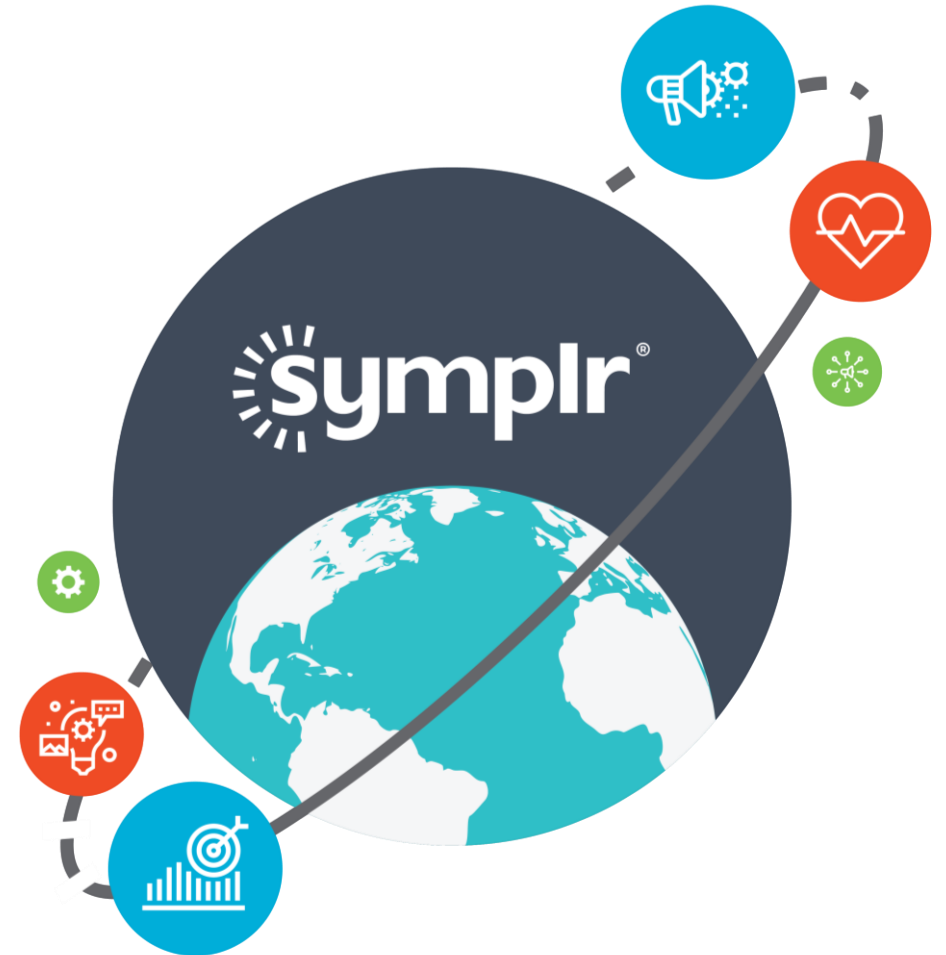
Quality

Improving processes



Releases

Align cadence with Industry demand



symplr Contract (CLM 2.0) Benefits vs. MT 1.0



Better Design

- Intuitive navigation
- True SaaS
- Workflow visualization



Improved Integration

- Integrates disconnected components together
- Superior Compliance Module & Mobile App improvements



Enhanced Communication

- Notifications engine
- Confidential commenting
- Clearer, simpler language



Greater Reporting & Admin Functions

- Analytics out-of-the-box
- Robust role-based permissions
- Standard administrative functions
- Faster auditing



Easier Access

- Single login
- Configurable searching & filters

Product Roadmap Disclaimer

The Product Roadmap elements and timing depicted in this presentation outline our general product roadmap direction and are intended for information purposes only. Items in this presentation should be considered a commitment to deliver any materials, features, functionality or code changes.

The development, release and timing of any materials, features, functionality or code changes are subject to change and are at the sole discretion of symplr.

symplr Contract Roadmap

Themes

Outcomes

Mt. W, X, Y, Z
April-July '21

Mount ?
August '21

2021.1
Q4 2021

2022.1
Q1 2022

2022.2
Q2 2022

2022.3
Q3 2022

2022.4
Q4 2022



Administrative & Configuration Functions

Contract Library

Directories

Forms

Integrations

Compliance Modules

Notifications

Permissions

Reporting

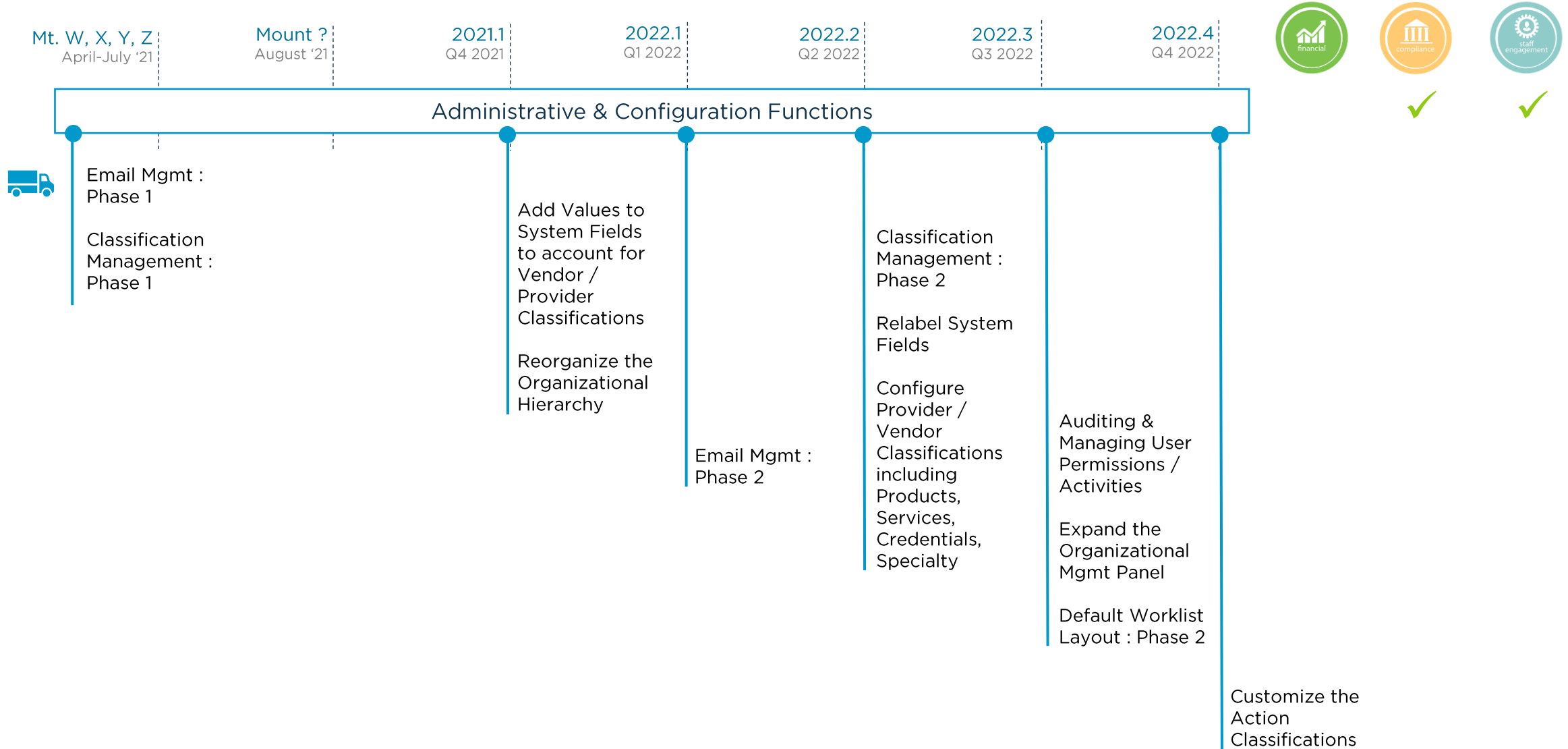
Workflow Improvements



symplr Contract Roadmap

Themes

Outcomes



symplr Contract Roadmap

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Contract Library

Edit Contract
Record without
Workflow

Custom Contract
Summary Layout

Easily
Distinguish
between Fields
Names & Names
in all Field Tabs

symplr Contract Roadmap

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Directories

Filter by
Contract Type in
Users

Required Fields
in Vendor /
Provider
Directories

symplr Contract Roadmap

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Forms



Block Phase Triggers



Form Builder: Phase 2

Trigger Templates from a Form

Configure Required Attachments

Relational Dependent Dropdowns

Section Level Permissions

Form Triggers Email the User

Combine 2 Trigger fields with "And" Logic

Calculated Fields

Trigger Fields in Different Sections of a Form

Compliance Questions

symplr Contract Roadmap

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Integrations



SSO : Multiple
ADFS Handling



Signatory
Proxies / User
Groups

DocuSign
Improvements

Office365
Integration

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Compliance Modules



Pulse Check (VEF):
Phase 1



Gift Alert
(Accumulator): Phase 1



TERMS: Phase 2



TERMS: Min/Max
Tracking

TERMS: Auto-
Copy

TERMS: Disable
Certify until Time
Entry is
Complete

TERMS: Track
Total Comp

Conflict Capture
(COIDS)

TERMS: Edit
emails for
Locked
Timesheets

Pulse Check
(VEF): Phase 2

Gift Alert
(Accumulator):
Phase 2

TERMS: Android
App

symplr Contract Roadmap

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Notifications

Notification
Configuration
Specifying
Action
Requirements

Tagging
Notification
Comments by
Role

symplr Contract Roadmap

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Permissions

Expand List of Responsible Parties for specific Contracts

Super Admin Role

Initiate Workflows w/o Editor Permission

Do Not Allow Phase Owner to Complete Phase while Review is Open

Partial Location Matching

Expand Permission Control to Other Users

symplr Contract Roadmap

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Reporting

Enhance Search
Across All Orgs

Robust
Reporting
Engine

Audit Trail
Report

Search & Report
on Comments

Save / Share
Reports to Other
Users

Dashboard
Enhancements

Add Activity
Group to the
Timesheet
Report



sympplr Contract Roadmap

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Workflow Improvements

View, Sort & Filter Customer Fields in Worklists

User Group Improvements

Simultaneous / Parallel Workflows

Smart Templates

Expand Document Viewer & Editor to Full Screen Mode

Executive Summary Controls

Limit Initiation of a Workflow by Role

Phase Owner Sequencing in Workflow Template

Form Data Ordering

Set Default Responsible Parties

Simultaneous Review in Form Phase

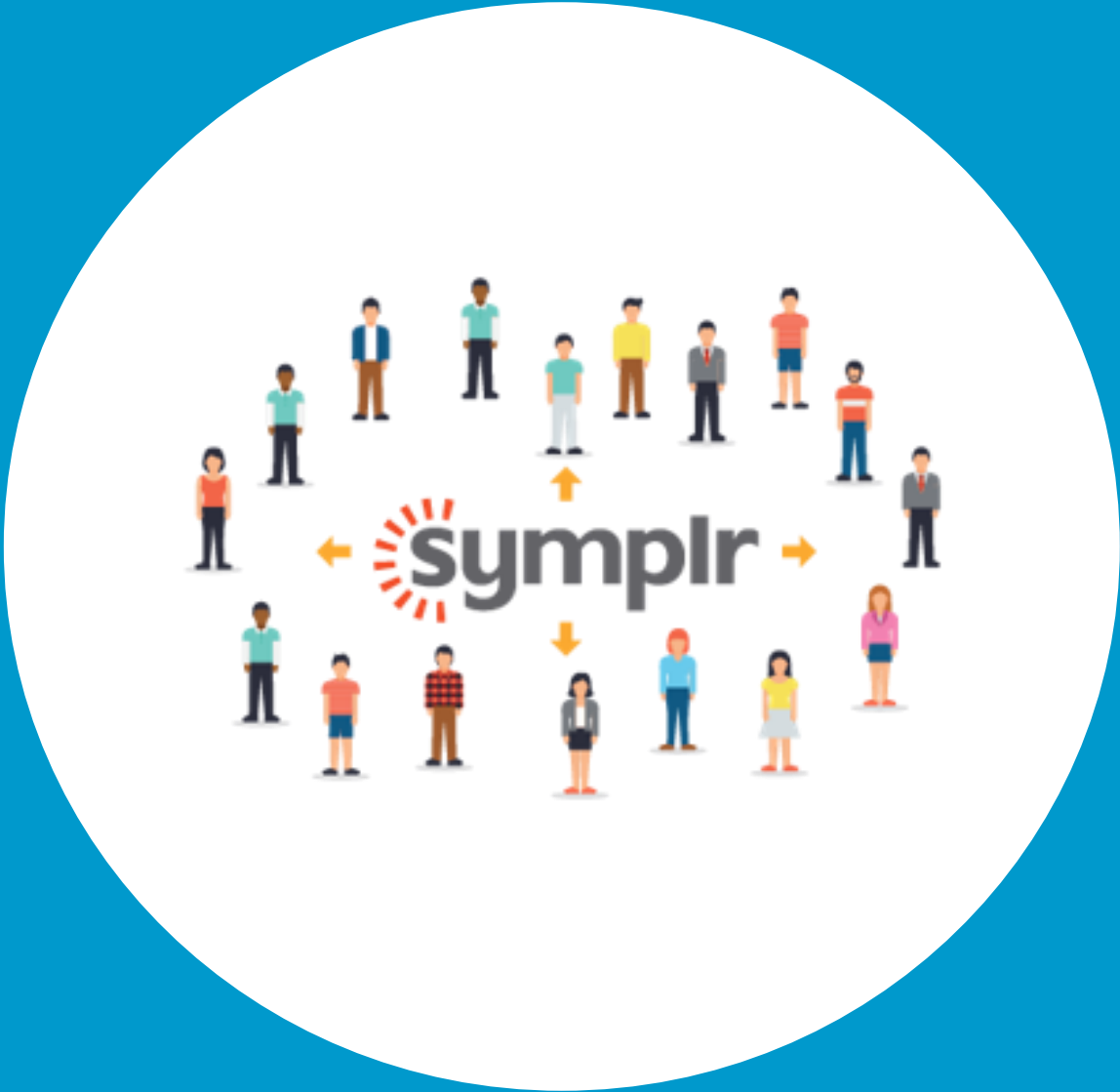
Convert Documents to PDF

Reviewer Able to Forward to Another Review

Do Not Require Phase Owner Approval

Pre-fill in Vendor Details

Contract Description added to Workflow Initiation



People to Know

People You Should Know

Mike Morrison
Senior Director of Customer Support
mmorrison@symplr.com

Support: Configuration, problem solving, trouble shooting, outages

Tres Thompson
COO

tthompson@symplr.com
Executive point of contact

When in doubt
askbj@symplr.com



Nathan
Director of Product Management
nhershkowitz@symplr.com

Product: roadmap, enhancements, development

Bill Christy
Senior VP of customer Excellence
wchristy@symplr.com

Customer Success, Customer Support

Kelly Hoell
Senior Director of Customer Success
khoell@symplr.com

Expansion, adoption, utilization goals



What's Next?

Next time: Accountability to You

Today's Commitments

Improve our Release Quality

Deliver on July & August Functional Commitments

Provide Feedback learned through our Newly Launched Customer Boards

Align our Customer Success Managers to each Customer and begin communication

Next Webinar

September 29th

12 noon - 1 PM CST





Let's hear your questions!



THANK YOU

hello@symplr.com

