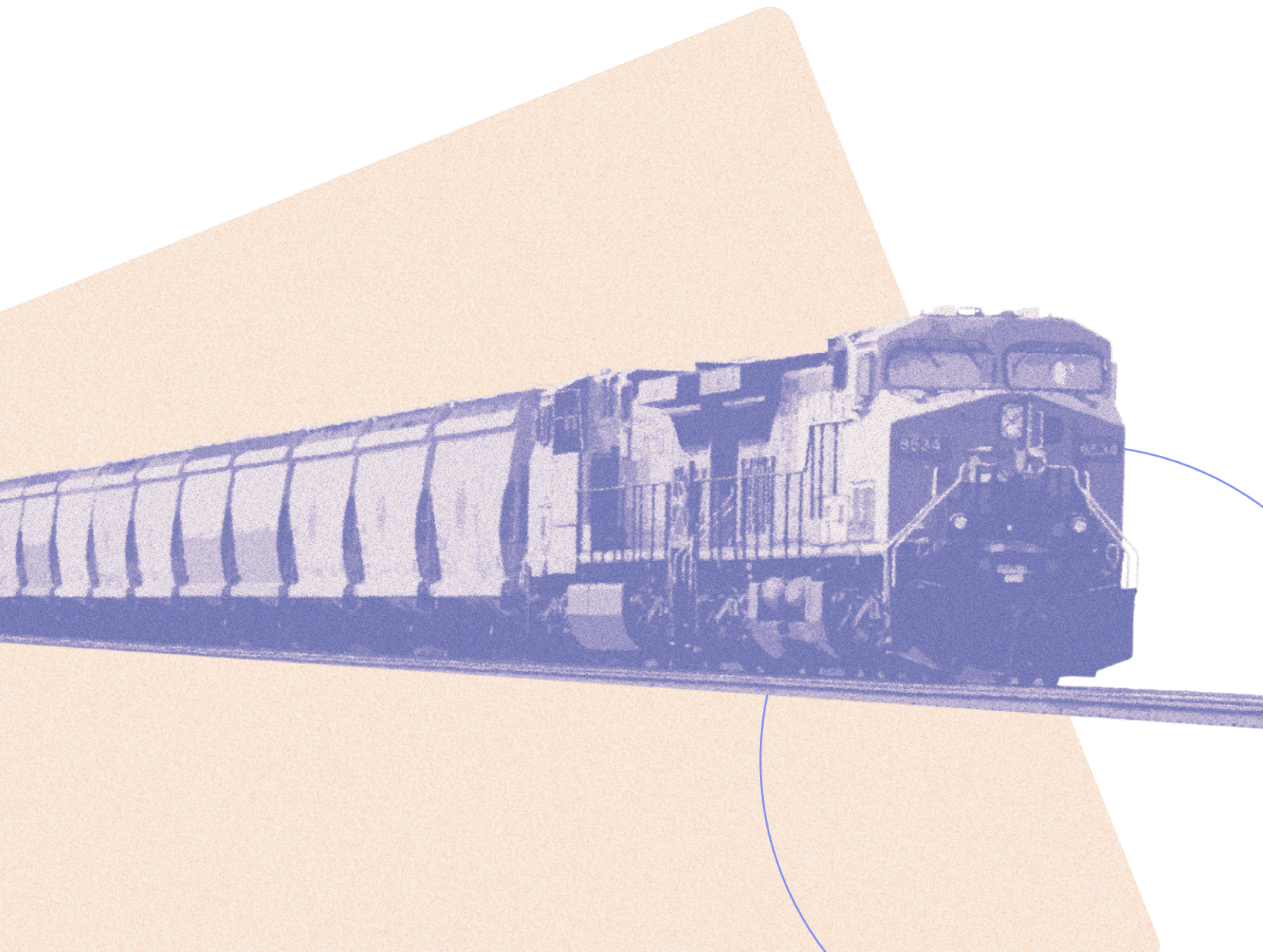


CUSTOMER CASE STUDY

# OmniTRAX Onboards LinkSquares in Six Weeks to Meet Critical Deadline and Streamline Compliance Process



# Meet OmniTRAX



**ANDREW EVANS**  
Senior Counsel



**JENNIFER PRESNALL**  
Senior Director of  
Internal Controls



**CASSIE RODRIGUEZ**  
Contracts Compliance  
Manager

## INDUSTRY

Rail and Real Estate

## LOCATION

Denver, Colorado

## MANAGEMENT

20+ Railroads  
5 Rail Served Industrial Park

In the United States, there are more than 140,000 miles of railroad track dedicated to hauling freight, handling about a third of all U.S. exports and 40% of long-distance cargo shipments. Each day, domestic and global supply chains rely on an integrated rail network that transport cargo thousands of miles across North America. These critical rail operators unlock rail access to thousands of cargo shipments each day. This is where Denver, Colorado-based OmniTRAX comes in. OmniTRAX is one of North America's largest and fastest growing private railroad and transportation management companies, managing more than 20 short line railroads.

The OmniTRAX rail network spans 16 U.S. states and 2 Canadian provinces. To maintain appropriate local, state, federal and provincial compliance, OmniTRAX contracts with numerous government entities, from large federal agencies to small county governments with various compliance standards. The OmniTRAX team tasked with managing this vast array of agreements and regulations includes **Andrew Evans**, Senior Counsel; **Jennifer Presnall**, Senior Director of Internal Controls; and **Cassie Rodriguez**, Contracts Compliance Manager.





## The Challenge

Due to the complexities of transporting cargo and commodities across state and federal borders, rail is an extremely regulated industry. Given OmniTRAX's vast reach, that requires routine compliance with thousands of contracts across the company's portfolio. Along with tracking their obligations, many of the government agencies they work with also require detailed financial reports each quarter.

Historically, OmniTRAX manually tracked compliance and reporting, but sought an automated compliance solution.

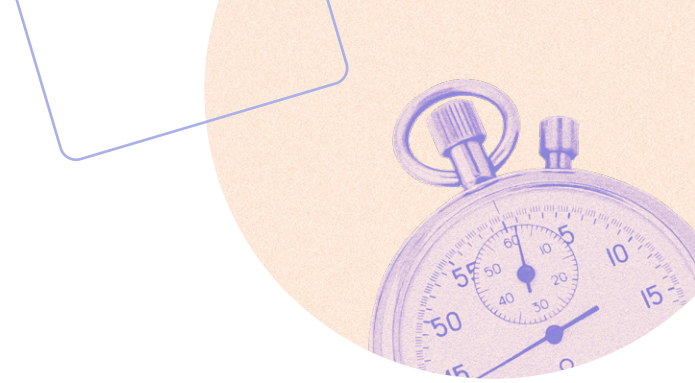
"In addition to compliance capability, we sought a platform that would help us better manage our revenue contracts," remembers Presnall. "How many do we have? When do they expire? We needed a system that tracked all of that for us, too."

## The Deadline

While assessing a series of contract management vendors, OmniTRAX received a demonstration of LinkSquares, specifically looking to understand and evaluate LinkSquares AI. With so many reporting obligations – each requiring a disparate array of information – they needed a system that could provide insight into all their terms. With LinkSquares' ability to automatically identify and extract more than 100 pieces of metadata, the OmniTRAX team found a way to access all the terms, dates, and figures they needed – for general compliance, financial reports, and revenue management. They also found it highly intuitive, which they felt would help boost adoption across the company.

In November of 2021, they purchased LinkSquares. With a new contract management solution secured, they turned their attention to the next challenge ... time. Their legacy system was expiring on December 23, 2021, giving them a mere six weeks to fully transition from one platform to another. The pressure was on.





## The Onboarding

Though six weeks was an aggressive timeline to implement both LinkSquares Analyze and LinkSquares Finalize, there was confidence among all involved that a collaborative effort could meet the deadline. Like all LinkSquares customers, OmniTRAX was assigned a dedicated team of two product experts: a Customer Success Manager (CSM) to project manage the onboarding, run any necessary trainings, and provide ongoing support; and a dedicated Implementation Consultant (IC) to run the full range of technical requirements. They set up a cadence of one standing meeting per week to review progress, blockers, and next steps to keep the process moving forward. Additional meetings were also scheduled each week to work through targeted needs, such as template creation and integrations.

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'Look, there's a way to get a contract in  
place in **5 minutes** using LinkSquares.'”

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ANDREW EVANS  
Senior Counsel

### Analyze

The first goal was to pull thousands of legacy agreements into Analyze. The OmniTRAX team was able to locate the majority of these contracts in their existing repositories. All contracts were then dragged-and-dropped into a dedicated Dropbox folder set-up by the LinkSquares team. Once in the folder, all contracts were automatically ported to Analyze where they underwent the automated ingestion process: relevant pieces of metadata were extracted from each agreement, the agreement was named based





on a predetermined naming convention, and each document was placed in the secure repository. Some contracts, including ones dating back to the 1940s, were also put through an additional OCR process to pick-up handwritten dates.

“We were very impressed with [our CSM’s] availability,” says Presnall. “He not only made himself available for several training sessions with different teams, but also took the time to understand exactly what those teams wanted and needed to see and built his content around that.”

### **Finalize**

With OmniTRAX creating more than 130 agreements per quarter, the second goal was to develop a series of contract templates within Finalize to enable self-service drafting. Their CSM met with Rodriguez three times to review the process for setting up templates, after which she was able to create more than 40 templates herself. Though most companies require fewer templates, OmniTRAX was easily able to spin up all they needed for their specific use cases, including various transportation and real estate agreements.

These templates were then mapped to the Finalize App in Salesforce, which allows their Commercial and Revenue teams to initiate any contract they need right from within the tool they use every day – Salesforce. Approval workflows were also set-up, ensuring that any new contract was routed to the General Counsel or Associate General Counsel for review and approval. As necessary, additional calls were set-up with the LinkSquares Product Manager for Integrations to ensure the Salesforce integration was being set-up to meet the specific needs of OmniTRAX.

"The pitch to our Commercial team is: 'Look, there's a way to get a contract in place in 5 minutes using LinkSquares,'" says Evans. "And I'm happy that we've been able to make that happen."





## The Solution

With the onboarding deadline met, the OmniTRAX team was able to breathe and enjoy the holidays ... but the benefits didn't stop there. With Analyze, they have found the expanded efficiency and analysis they sought in a new platform. And with LinkSquares' reporting capabilities, they can now identify various compliance requirements.

"Now I can get what I need in seconds. The system is easy to use and everything's at my fingertips," says Presnall.

Beyond centralizing their portfolio, OmniTRAX has been able to transform their pre-signature process with template-based drafting in Finalize and the Finalize App in Salesforce. Anyone who needs a contract can now initiate the contract themselves, with preset workflows automatically routing directly to Legal for approval, saving a significant amount of time.

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JENNIFER PRESNALL

Senior Director of Internal Controls

“With LinkSquares, the time it takes me to get to the essence of what I need to review is dramatically reduced. I can't underscore enough how important a change that is,” shared Evans. “I've been an attorney for 15 years and LinkSquares is the most useful platform I've seen. That makes me a huge fan of LinkSquares.”

