Ultimarii

CASE STUDY

Scaling In-House Legal Capacity for Renewable Asset Portfolios



www.ultimarii.com

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The Challenge

Contract Complexity That Compounds Over Time

A Canadian renewable asset operator manages a diversified portfolio of generation facilities, transmission assets, and long-lived commercial agreements. The business is underpinned by **dozens of multi-year land leases, Power Purchase Agreements (PPAs), interconnection agreements, and standard commercial terms**, often spanning multiple jurisdictions and counterparties.

Over a **20+ year asset lifecycle**, these agreements are amended repeatedly—tariff updates, regulatory changes, scope adjustments, and negotiated carve-outs layered on top of one another. While the organization had a contract management system to store documents, it offered no way to interpret them holistically.

As a result, the internal legal team faced a growing visibility gap:

- Understanding what had changed across multiple amendments required **manual, page-by-page comparison**
- Critical context lived in inboxes and institutional memory rather than in a structured system
- Routine reviews and renegotiations routinely defaulted to external counsel—not due to lack of legal expertise, but lack of time and clarity

As amendment volume increased, so did cost, latency, and risk.

Ultimarii’s Approach

Turning Contracts into an Intelligence System

Ultimarii was brought in to transform a static document repository into a governed, intelligence-driven legal workflow.

All multi-year leases and related agreements were ingested into private Ultimarii libraries, creating a secure foundation for analysis. From there, Ultimarii worked with the legal team to design and deploy custom playbooks that reflected how the organization actually reviews, negotiates, and manages contracts.

Rather than replacing legal judgment, Ultimarii focused on removing the manual work that consumed it.

The Solution

1. Amendment Intelligence & Contract Lineage

Ultimarii configured custom playbooks to automatically stitch together base agreements with every subsequent amendment—regardless of formatting, naming conventions, or version inconsistencies.

For each contract, the platform now generates:

- A **clause-level history** showing how key commercial and legal terms evolved over time
- **Timestamped summaries** of modifications by amendment
- Identification of **new or altered obligations**, renewal triggers, and compliance deadlines
- A clear map of **parties, dates, and governing terms** across the full lifecycle

What previously required **8–12 hours of manual review** is now delivered as a structured, audit-ready summary **in under 45 minutes**. In many cases, **100+ pages of disjointed PDFs are reduced to a 2-page strategic brief in less than 10 minutes.**

For the first time, the legal team could assess the *entire contract lifecycle*, not just the most recent version.

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2. Preferred Language Governance & Negotiation Support

The organization had a well-defined internal view of "what good looks like"—preferred clauses, definitions, and commercial positions designed to manage risk and reduce ambiguity across counterparties.

Ultimarii operationalized these standards directly into the workflow. The platform now automatically:

- Flags deviations from preferred language
- Highlights inconsistencies between versions
- Suggests pre-approved revision language and counterparty responses
- Surfaces targeted follow-up questions for negotiation

This was not a binary comparison exercise. It became a **context-aware negotiation tool**, enabling the internal team to move faster while staying aligned with internal risk standards.

The Impact

Measurable Gains Without Additional Headcount

By embedding legal intelligence directly into its workflows, the organization achieved clear operational improvements:

- **90% reduction in review time:** Deep contract reviews dropped from 8–12 hours to under 45 minutes
- All routine lease reviews and renegotiations are now completed in-house, shifting external counsel from day-to-day support to strategic escalation only.
- **3× faster counterparty response times,** reducing delays during audits, refinancing, and diligence cycles
- **Zero version-control errors:** Eliminated reliance on outdated base agreements missing critical amendments



The Strategic Outcome

From Document Storage to Legal Intelligence

This shift transformed the legal function from a reactive cost center into a proactive partner in asset management.

Where the contract management system stored information, Ultimarii converted it into actionable intelligence—clarity that improves decision-making, negotiation posture, and internal velocity.

As a senior paralegal described it:

“For the first time, I can see the entire contract lifecycle at once—past, present, and future implications. We aren’t just answering questions faster; we’re negotiating from a position of clarity. Ultimarii lets us operate like a much larger legal team, without increasing headcount.”

The Bottomline

Scaling Legal Capacity Without Scaling Cost

This case demonstrates how asset-heavy organizations can scale legal capacity in step with portfolio growth—without hiring additional staff or outsourcing routine work.

For Ultimarii, it highlights a core strength: **turning institutional standards into repeatable, governed workflows** that compound in value over time.

For customers, the message is clear:
You don’t need more lawyers to handle contract complexity—you need better systems.

