

Contract Management Software Implementation Checklist

Map Out Your Current Workflow	
Questions To Ask	Comments & Notes
<input type="checkbox"/> How are contracts currently managed in your organization?	
<input type="checkbox"/> How do you create and onboard new contracts?	
<input type="checkbox"/> How are existing contracts organized and tracked?	
<input type="checkbox"/> What contract information do you store? How do you keep track of it?	
<input type="checkbox"/> Who can access contract information? Is this data sensitive?	
<input type="checkbox"/> Do you need a system that provides remote access to contracts?	
<input type="checkbox"/> How many people will need to access and be trained on the new software?	
<input type="checkbox"/> How many contracts do you need to manage? How many people need to have access to this information?	
<input type="checkbox"/> Do you have a single source of truth for your contracts?	
<input type="checkbox"/> How much time do you spend tracking down contracts?	
<input type="checkbox"/> Are there specific tools (like Salesforce or HubSpot) with which your new contract management tool needs to integrate?	
<input type="checkbox"/> What other hiccups frequently occur in the process?	

Questions To Ask	Comments & Notes
<input type="checkbox"/> What works well with your current process that you want to keep?	
<input type="checkbox"/> Do you need a system that completely overhauls your contract management or one that bridges the gaps?	
<input type="checkbox"/> Does this system need to manage the entire contract lifecycle from drafting to reporting?	

Identify Pain Points and Necessary Features			
	Yes	No	Feature To Look For
Are you spending too much time on manual data entry?	<input type="checkbox"/>	<input type="checkbox"/>	AI data extraction and tagging
Are people working from different contract versions?	<input type="checkbox"/>	<input type="checkbox"/>	Version control and approval workflows
Are you wasting time drafting contracts from scratch?	<input type="checkbox"/>	<input type="checkbox"/>	Contract and clause templates
Do you have an unclear approval process?	<input type="checkbox"/>	<input type="checkbox"/>	Workflow management, roles, and email notifications
Do you keep missing deadlines?	<input type="checkbox"/>	<input type="checkbox"/>	Reminders and alerts
Are you struggling to maintain and track contract compliance?	<input type="checkbox"/>	<input type="checkbox"/>	Compliance management and audit trails
Are you struggling to locate contracts?	<input type="checkbox"/>	<input type="checkbox"/>	Folder-driven contract repository with optical character recognition (OCR)

Identify Pain Points and Necessary Features

	Yes	No	Feature To Look For
Is it hard to keep track of who has access to contracts?	<input type="checkbox"/>	<input type="checkbox"/>	Roles and permissions
Are you unsure of where contracts stand in their lifecycle?	<input type="checkbox"/>	<input type="checkbox"/>	Contract tracking and an organized repository
Are you unable to effectively track changes and actions taken on contracts?	<input type="checkbox"/>	<input type="checkbox"/>	Actionable reporting tools

Do Your Research

	Pro Tip	Notes
Would you prefer a pay-per-user or pay-per-contract model?	Companies with few users may prefer a pay-per-user model, while companies with many users would likely benefit most from a pay-per-contract model.	
What is your budget?	Many companies have additional implementation costs. Be sure to account for these in your overall budget.	
How quickly do you need your new system to be up and running?	If you're in a hurry, look for software with a quick implementation window and dedicated support.	

Do Your Research

	Pro Tip	Notes
Do you need to upload legacy contracts?	Some companies will upload your old contracts as an additional service, which can be a huge time-saver!	
Does the software offer data extraction and organization features?	High-quality data extraction features can make all the difference when trying to find a file in a hurry.	

Ask These Questions During the Demo

Question	Answer
What's the onboarding timeline? How soon can we get the system up and running?	
How many team members can join the call?	
Do we need a tech whiz to use the software, or is it user-friendly for all?	
If we do hit a snag, what does your support look like?	

Ask These Questions During the Demo

Question	Answer
Are there user trainings, a dedicated support rep, or a Jumpstart program?	
Is there an AI assistant to help us navigate?	
How can your system streamline our contract drafting, approval, and execution process?	
How does the search feature work?	
How easy is it to customize alerts and notifications?	
How does your system handle third-party contracts?	
Is it smart enough to pull out the key information we need?	
What measures do you have in place to keep data safe?	

Ask These Questions During the Demo

Question	Answer
If we want to move our existing contracts over, how does that work?	
How long would it take, and how does the system extract metadata or contract fields from them?	
Will this software play nice with our existing technology stack?	

Map Out the Onboarding Process

Question	Yes	No
Do we need a jumpstart program?	<input type="checkbox"/>	<input type="checkbox"/>
Do we need to move all active contracts?	<input type="checkbox"/>	<input type="checkbox"/>
Do we need a dedicated customer support manager?	<input type="checkbox"/>	<input type="checkbox"/>