

Checklist before implementing a contract solution

Document owner: Your name and role

Project stakeholders:

This checklist provides a structure to ensure that all critical aspects and success metrics are considered before you embark on your digital contract journey for a successful and efficient implementation of a contract solution. It's meant to kick start the project by defining the current state of your contract process and your desired state so that project stakeholders are aligned on the background and goals of such implementation, by articulating the actual business problems you solve by setting these goals. This checklist does not cover the costs or business case associated with the solution implementation.

Understand your current contract process

Checklist	Stage	Activity	Responsible	Status	Deadline
☐	Pre-sign stage	Describe processes related to contract creation, negotiation, and approval. <i>Example:</i> Contract creation is requested from legal and the time from draft to approval is 5 business days. Contract negotiation is done in emails and once agreement is reached, the commercial team exports documents into PDF to be signed.		Not Started ▾	📅 Date
☐	Sign stage	Describe processes related to the execution of the contract. <i>Example:</i> Contracts are signed with an electronic signing solution by uploading the final negotiated PDF.		Not Started ▾	📅 Date
☐	Post-sign stage	Describe processes centering on contract performance, compliance, and renewal. <i>Example:</i> Contract milestones are manually tracked by adding reminders in the calendars.		Not Started ▾	📅 Date

Define the goals of your desired contract process

Checklist	Stage	Activity	Business problem it solves	Responsible	Status	Deadline
☐	Pre-sign stage	Define goals related to contract creation, negotiation, and approval. <i>Example:</i> Automate 80% of repetitive contract management tasks. Reduce contract approval time by 30% within 6 months. Decrease negotiation time by 50% through enabling real-time edits and approvals.	☐ Get more customers ☐ Make customers worth more ☐ Increase enterprise value		Not Started ▾	 Date
☐	Sign stage	Define goals related to the execution of the contract. <i>Example:</i> Implement a two-step authentication signing method on 50% of all outgoing contracts for better security.	☐ Get more customers ☐ Make customers worth more ☐ Increase enterprise value		Not Started ▾	 Date
☐	Post-sign stage	Define goals centering on contract performance, compliance, and renewal. <i>Example:</i> Track contract milestones automatically with reminders. Use analytics to identify and address common bottlenecks in contract cycles.	☐ Get more customers ☐ Make customers worth more ☐ Increase enterprise value		Not Started ▾	 Date

Checklist	Stage	Activity	Business problem it solves	Responsible	Status	Deadline
☐	Implementation	Define goals related to the implementation process. <i>Example:</i> <i>Implement digital contract management software in Q1.</i> <i>Achieve 95% positive feedback on the contract management system from users.</i> <i>100% of all designated users have sent their first contracts within 1 month.</i>	☐ Get more customers ☐ Make customers worth more ☐ Increase enterprise value		Not Started ▾	📅 Date