CONCEPT

Contract Lifecycle Management (CLM): Digital Workflows, Repository and Renewals

17 – 21 May 2027
Amsterdam - Zuidas business district hotel



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Introduction:

Many organisations still run contract lifecycle management through email threads, shared drives and personal spreadsheets. Requests arrive without the facts a drafter needs, approved templates are bypassed, approvers sit outside any audit trail, signed files cannot be found and renewals roll over unnoticed. This Core Concept course shows contracts, legal operations, procurement and sales operations staff how to design a digital, vendor-neutral CLM process from intake to renewal and specify the system that supports it. Participants produce a CLM Process Design and System Requirements Specification for a case organisation.

Course Objectives:

- Map an organisation's current contracting process against the lifecycle stages from request to renewal and locate its delays and control gaps
- Design a request intake form, triage rules and a template, clause library and fallback playbook structure for high-volume agreements
- Configure authoring, redlining and approval routing workflows that apply a delegation of authority matrix and capture an audit trail
- Define repository metadata, milestone tracking and renewal and expiry alert rules so executed agreements stay searchable and acted upon
- Set contract analytics KPIs such as cycle time and value leakage and write selection, ERP and CRM integration and adoption requirements for a CLM platform
- Produce a CLM Process Design and System Requirements Specification ready for sponsor review

Target Audience:

- Contract managers who own the flow of agreements from request to signature and renewal
- Legal operations managers responsible for templates, clause standards and legal workload
- Procurement managers who issue supplier agreements and track supplier renewals
- Sales operations managers who handle customer quotes, order forms and commercial terms
- Process and systems owners tasked with selecting or rolling out a contract management platform
- Commercial and finance managers accountable for contract value, spend visibility and renewal decisions

Course Outline:

Day 1: Contract Lifecycle Foundations and Current-State Diagnosis

- Eight-Stage Lifecycle Model from Request to Renewal
- Manual Versus Digital Contracting: Email, Shared Drive and Spreadsheet Failure Points
- Contract Portfolio Segmentation by Type, Volume and Risk Tier
- Current-State Swimlane Map of the Contracting Workflow
- CLM Maturity Heat Map and Bottleneck Log

Day 2: Process Architecture: Intake, Templates, Clause Libraries and Playbooks

- Contract Request Intake Form and Triage Rules by Contract Category
- Self-Service Template Tiers for Non-Disclosure, Order Form and Master Services Agreements
- Clause Library Design with Standard, Fallback and Prohibited Wording
- Negotiation Playbook Structure with Escalation Thresholds
- CLM Data Model: Contract Record, Party, Clause and Metadata Fields

Day 3: Authoring, Approval, Signature and Repository Operations

- Authoring and Redlining Workflow with Version Control and Comparison Reports
- Approval Routing Rules Driven by a Delegation of Authority Matrix
- E-Signature Step Configuration: Signing Order, Signer Authentication and Completion Certificate
- Central Repository Taxonomy, Metadata Tagging and Access Permissions
- Milestone Tracking Calendar and Renewal and Expiry Alert Rules

Day 4: Analytics, AI Assistance, Integration and Platform Selection

- Contract Analytics Dashboard: Cycle Time, Approval Ageing and Value Leakage Indicators
- AI-Assisted Clause Extraction and Metadata Capture with Human Verification Checks
- ERP and CRM Integration Points for Supplier, Customer, Purchase Order and Opportunity Data
- CLM Vendor-Neutral Selection Scorecard, Demonstration Scripts and Total Cost of Ownership
- Digital Contracting in Public Tenders: Award-to-Contract Handover and Record Keeping

Day 5: Case Organisation: CLM Process Design and System Requirements

- Case Organisation Brief: Multi-Sector Contract Portfolio and Pain Points
- Future-State Process Map with Intake, Approval and Renewal Controls
- Functional and Non-Functional Requirements Catalogue with MoSCoW Priorities
- Implementation Roadmap, Data Migration Plan and User Adoption Measures
- Sponsor Review Panel: Requirements Specification Defence

Skills You Will Gain:

- Contract Process Mapping
- Intake and Triage Design
- Clause Library Governance
- Approval Workflow Configuration
- Contract Metadata Design
- Contract Performance Analytics
- CLM Platform Evaluation
- Change Adoption Planning

Why Attend This Course:

- Leave with a CLM Process Design and System Requirements Specification tested before a sponsor review panel
- Shorten the time from contract request to signature by removing re-keying, lost drafts and approval loops
- Stop unnoticed auto-renewals and missed expiry dates through alert rules tied to repository metadata
- Compare digital contracting practice with contracts, legal, procurement and sales operations peers from other sectors

Conclusion:

Contract lifecycle management works when every agreement follows one visible path from request to renewal. The course moves from diagnosing the current contracting workflow, through intake, templates, clause libraries and playbooks, to authoring, approval routing, signature, repository and alert operations, then analytics, AI-assisted extraction, integration and platform selection. The final day applies this to a case organisation, and participants leave with a CLM Process Design and System Requirements Specification that can guide selection and roll-out in their own organisation.