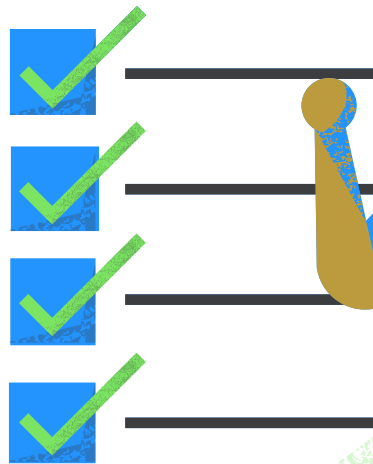*Contract Management Software Must-Haves*

ContractSafe

CONTRACT LIFECYCLE MANAGEMENT SOFTWARE CHECKLIST

What you really need. What's worth considering. What to skip (for now).

Contract lifecycle management software (CLM) is meant to make your life easier, not feel like a whole new job. The right tool will save time, minimize risk, and help your business scale. That said, contract management looks different for every team. With so many solutions out there, it's easy to get overwhelmed, unsure what to prioritize—or where to even begin. Without a clear roadmap, you risk paying for features you won't use or getting stuck with tools that can't keep up.

This checklist is here to help you cut through the noise. Whether you're ditching spreadsheets or upgrading your current setup, we'll help you zero in on what you need now —and what will still work as you grow—without unnecessary complexity or high costs.

We've organized this checklist into three categories to help guide your search:

1 **The Basics:** These are foundational features every contract management solution should have. No extra fees. No learning curve. Just the essentials to get you out of spreadsheets and into a better way of working.

2 **Start Automating Workflows:** Once the basics are in place, it's time to streamline and speed things up. These features help eliminate repetitive tasks, reduce bottlenecks, and keep your contracts moving.

3 **Automate from Start to Finish:** For teams that are scaling fast or handling high volumes, these features bring end-to-end efficiency. They're powerful, but not always necessary from day one.

ContractSafe
CLM SOFTWARE CHECKLIST

THE BASICS (Foundational Essentials)

Start here. These features should come standard—no upsells.
You shouldn't need a custom implementation, advanced configuration, or pricey add-on to get the basics done.

Fast Setup and Ongoing Support with Actual Human Help

Look for a contract management solution that makes importing contracts easy, whether 10 or 10,000, and doesn't require IT help. And when you need help, you should get it from a real person who knows your account, not a chatbot or a paywalled support tier. *Look for:*

- [ ] Onboarding support at no extra cost
- [ ] Training resources that make sense
- [ ] A dedicated customer success manager— one who's easy to reach
- [ ] Ongoing responsive support with no surprise fees

Ease of Use (Really)

The right platform should simplify the entire process—from drafting to approval, signature, and renewals—and make collaboration easy, even with people outside your organization. And here's the thing: everyone says they're "easy to use." Don't take their word for it. Try it yourself. If it's not easy to get started during a free trial, it's only going to get harder from there. If your team says, "That was easy," you've found the right tool. *Look for:*

- [ ] An intuitive interface that doesn't require a training program
- [ ] Clear, friendly navigation that makes sense to occasional users
- [ ] Easy ways to create customized reports without an engineering degree
- [ ] Customizable views so you can see the information that matters to you
- [ ] Seamless integration with intake forms and templates

Find-anything Search That Delivers

Optical Character Recognition (OCR) and keyword search are the baseline. But smart search goes further, letting you ask natural-language questions and get the right results. No more guessing at filenames or digging through folders. Just fast answers and serious time saved. *Look for:*

- [ ] OCR (Optical Character Recognition) that makes even scanned PDFs searchable
- [ ] Powerful keyword and full-text search that indexes your entire contract library—every word of every document, not just titles or tags. Even scanned PDFs are searchable. It's like having Google for all your contracts—just type and find
- [ ] AI-enabled search so you can ask "show me contracts over $100K expiring next quarter" and get results fast

CLM SOFTWARE CHECKLIST

THE BASICS (Foundational Essentials)

✓ Enterprise-Grade Security

Contract data is sensitive; your platform should treat it that way. Look for bank-level encryption, secure servers, and regular updates. If you wouldn't trust it with your credit card, don't trust it with your contracts. *Look for:*

- [ ] Strong encryption and SOC2 Type 2 compliance that proves your data is protected by strong internal controls—not just promises
- [ ] ISO-27001 certification for serious security standards
- [ ] HIPAA compliance if you're in healthcare (surprisingly, not everyone offers this)
- [ ] GDPR compliance and data residency options for global teams or anyone who needs to know exactly where their data lives—and that it's staying there

✓ Scalable Repository

Watch out for storage limits and surprise fees as your needs grow. Your contract management system should scale with you—without adding complexity or forcing you into constant plan upgrades. You need a secure place to keep contracts organized and easy to access, whether you're managing 50 or 50,000. *Look for:*

- [ ] A secure, cloud-based home for all your contracts, amendments, and attachments
- [ ] Flexible organization with tags, folders, and contract types that make sense to you
- [ ] Granular (and easy) permissions to control who can see, edit, download, or delete—based on role, department, or seniority
- [ ] Audit trails so you can easily see who's looked at, changed, or added something to a contract, and when

✓ Flexible File Handling

Not all contracts are clean, digital, or created in your own templates.
Make sure your system can handle third-party documents, scanned files, and the day-to-day realities of modern contract workflows. Your contracts come in all shapes and sizes—your platform should handle them all. *Look for:*

- [ ] Support for PDFs, Word docs, and scanned files
- [ ] Easy import options like drag-and-drop or email-in
- [ ] Bulk uploading to get your contract library centralized fast
- [ ] Options to save online terms or privacy policies by pasting a link
- [ ] The ability to attach, organize, and store supporting documents (invoices, expired contracts, quotes, price lists, emails, etc.) alongside each contract

ContractSafe

CLM SOFTWARE CHECKLIST

THE BASICS (Foundational Essentials)

AI-powered Organization

AI in contract management isn't just buzzwords - it's about eliminating the tedious manual work that slows your team down. The right AI features can cut hours off contract processing by automating data entry and helping to organize contracts intelligently. ***Look for:***

- ☐ Automatic data extraction so you don't have to enter everything manually
- ☐ Smart recognition of amendments and their connection to the main agreements
- ☐ Contract type identification that helps organize contracts
- ☐ Clear indication when data is pulled by AI versus confirmed by a human, so you know what's been verified

Date Tracking + Email Alerts

Start dates, end dates, auto-renewals—your contract management software should track it all. Look for a tool that flags every key date and sends reminders, so you never miss a deadline (or get stuck with a contract you meant to cancel). ***Look for:***

- ☐ Automatic tracking for all the dates that matter—contract renewals, expirations, payments, audits, certificate of insurance renewals, license expirations, permit renewals, and more—so nothing slips through the cracks
- ☐ Customizable email alerts for ALL important dates that notify the right people before deadlines hit
- ☐ Ability to notify stakeholders—even those without system logins—and include a copy of the contract right in the notification for easy access

Custom Fields, Dashboards & Reports

Reporting should be easy. Your contract management software should give you the flexibility to track what matters most to your team. That means customizable fields to capture the data points you care about, intuitive dashboards, and easy-to-generate reports. Your software should fit your reporting needs—not the other way around. ***Look for:***

- ☐ The ability to add custom fields without having to bug your IT — organize those fields by contract so you can tailor how you collect and manage your information exactly the way your team needs
- ☐ Ready-to-use reports on contract status, renewals, and activity
- ☐ Easy ways to create and send custom reports to anyone—no engineering degree needed
- ☐ Schedule reports to go out automatically, so you can set it and forget it
- ☐ One-click export to Excel or CSV when you need to work with your data elsewhere

THE BASICS (Foundational Essentials)

Affordable, Transparent Pricing

Affordability depends on your business needs. Choose a solution with the features you will use—no costly extras. Consider the total cost, including setup, training, and maintenance. Avoid systems that require heavy IT support. Look for transparent pricing and true value that fits your budget without surprises. *Look for:*

- [ ] Unlimited users on all plans, so adding team members doesn't break the bank
- [ ] Features that match your needs (not bells and whistles you won't use)
- [ ] Clear, transparent pricing without the "call for a quote" runaround
- [ ] No hidden fees or surprise charges
- [ ] Straightforward, predictable pricing that's easy to understand—and easy to budget. No surprise fees, no confusing pricing models—just pricing that stays put unless your needs change

Think you know contract management? Cut through the noise and get smart about what really works (and what doesn't).

👉 *Check out our* [*Ultimate Guide to Contract Management*](#)

START AUTOMATING WORKFLOWS (Keep Things Moving)

Ready to level up? These features help streamline the process and reduce busywork. You've got the foundation. Now it's time to simplify how contracts come in, get routed, and get signed—with fewer delays, follow-ups, or manual steps.

Single Sign-On (SSO)

For many businesses, SSO isn't optional—it's required. It streamlines logins, strengthens security, and lightens the load for IT by connecting your contract management system to your existing identity provider. ***Look for:***

- ☐ Compatibility with leading identity providers like Okta, Azure AD, and Google Workspace
- ☐ Seamless login using your existing credentials
- ☐ Integration with role-based access controls for secure, flexible access

Intake Forms

Getting contracts into your system should be easy. Look for features like intake forms to standardize requests, speed up drafting, and reduce manual entry. The simpler it is for your team to add contracts, the more accurate and complete your system stays—no gaps, no chaos. ***Look for:***

- ☐ Customizable request forms that capture the right information from the start
- ☐ Ability to give access to approved internal and external users
- ☐ Forms that integrate with your templates

Templates

If you regularly use the same type of contracts often (like NDAs or vendor agreements), templates can be a huge time-saver. If you can generate customized contracts in a few clicks instead of starting from scratch, your team can move faster and focus on bigger priorities. ***Look for:***

- ☐ Unlimited templates, fully customizable to your process and needs
- ☐ Easy updating when terms change
- ☐ Auto-route contracts for approval
- ☐ Use intake forms to trigger contract creation from templates

Approval Workflows

Automating contract approvals is a game-changer—if you have the right system. Keep contracts moving without the email follow-ups. Automating approvals helps you avoid bottlenecks, reduce delays, and ensure the right people review contracts at the right time. ***Look for:***

- ☐ Easy workflow automation with real-time alerts
- ☐ The ability to set approvers, approval groups, and approver order
- ☐ Automatic nudges when someone's taking too long
- ☐ Visibility into where things stand at any moment

![ContractSafe logo]

CLM SOFTWARE CHECKLIST

START AUTOMATING WORKFLOWS (Keep Things Moving)

Simple Editing

Fix a typo, edit a clause, or revise a draft—all without version chaos. Your platform should let you make quick changes directly or open documents in Word for full editing. *Look for:*

- [ ] In-platform editing for quick changes - no downloading, no re-uploading, or version confusion
- [ ] Built-in version control that tracks changes and keeps the latest version clear
- [ ] The ability to see redlined edits

In-Platform Commenting

No more email chains. Keep conversations where the work is happening. In-platform commenting lets your team collaborate in real-time—no more email threads or scattered feedback. Ask questions, flag issues, and loop in the right people without leaving the contract. *Look for:*

- [ ] The ability to comment directly on specific sections
- [ ] @mention to loop in the right people
- [ ] Threaded discussions that keep context with the content

Word Integration

Your team already works in Word—your contract management system should too. With Word integration, you can draft, edit, and redline contracts using full Word functionality, all while keeping everything tracked in one central place. Lock documents while they're being edited, view version history, and stay aligned across teams—without the confusion of downloading and reuploading files. *Look for:*

- [ ] Two-way integration for seamless editing between Word and your contract platform
- [ ] Permission controls to manage who can check out and edit documents
- [ ] Version history and redlines to track changes clearly
- [ ] Compatibility with both Word Desktop and Word Online

E-Signature

The right e-signature solution keeps everything in one place and eliminates those "where's the final signed version?" moments that waste everyone's time. With integrated e-signature capabilities, you can transform the final step of contract management from a headache into a seamless experience. *Look for:*

- [ ] Built-in e-signature capabilities that keep all data, reporting, and signed documents in one system
- [ ] Easy integration with leading e-signature tools if you prefer to use an external provider
- [ ] Ability to set the signing order for proper execution
- [ ] Automatic status updates
- [ ] Smart handling that preserves both signed and unsigned versions for reference

ContractSafe

CLM SOFTWARE CHECKLIST

AUTOMATE FROM START TO FINISH
(Advanced Integration & Power Add-ons)

For teams ready to scale and optimize the entire lifecycle. These power features aren't always essential at the beginning—but they can make a huge difference as your contract volume grows. Think smarter systems, deeper integrations, and more visibility. These can significantly improve how you work, but they're not deal-breakers for everyone.

✓ AI Contract Review

AI-powered review is no longer a futuristic extra—it's one of the most requested features out there. The right tool can surface potential risks, suggest stronger language, and help teams review contracts faster and more consistently. *Look for:*

- ☐ AI that flags risk language and recommends replacement clauses
- ☐ Smart redlining to highlight every edit between versions
- ☐ AI summaries to speed up review and approvals

✓ Out-of-the-Box Integrations

Your contract platform should work seamlessly with tools you already use—like Slack, Teams, Outlook, HubSpot, Salesforce, or e-signature tools like DocuSign, etc.. These built-in or Zapier-enabled connections help you save time, cut duplicate work, and make collaboration smoother across your organization. *Look for:*

- ☐ Direct or Zapier-enabled connections to tools your team already uses
- ☐ Seamless syncing that keeps your data aligned across platforms
- ☐ Easy setup without a developer or consultant required

✓ API Access

Need to connect your contract platform to custom tools or build something specific for your process? A robust API gives your team the flexibility to integrate exactly the way you need. *Look for:*

- ☐ Full API documentation and developer support
- ☐ Custom workflows and reporting connections tailored to your stack

✓ Other Features

While valuable, these features are often underused and add cost and complexity. A simpler, more budget-friendly solution may be better unless you truly need this functionality. *Look for:*

- ☐ AI that flags risks and suggests replacement language
- ☐ AI contract comparison that highlights every edit between versions
- ☐ Robust analytics dashboards that offer full data modeling and use predictive AI to surface emerging risks before they hit your desk
- ☐ Deep integrations with financial systems or other CMS platforms

ContractSafe

Find the Right Fit: Your CLM Software Checklist Recap

By focusing first on the essentials—organizing your contracts, tracking key dates, and making information accessible to everyone who needs it—you'll create a system that delivers immediate value and lays the groundwork for more advanced capabilities as your needs grow.

You might not need every feature today, and that's okay. The right contract management software solution should help you stay organized now, making it easy to scale, add users, control access, and track what matters most. It should be secure, cloud-based, and affordable—built to support your team today and ready to grow with you tomorrow
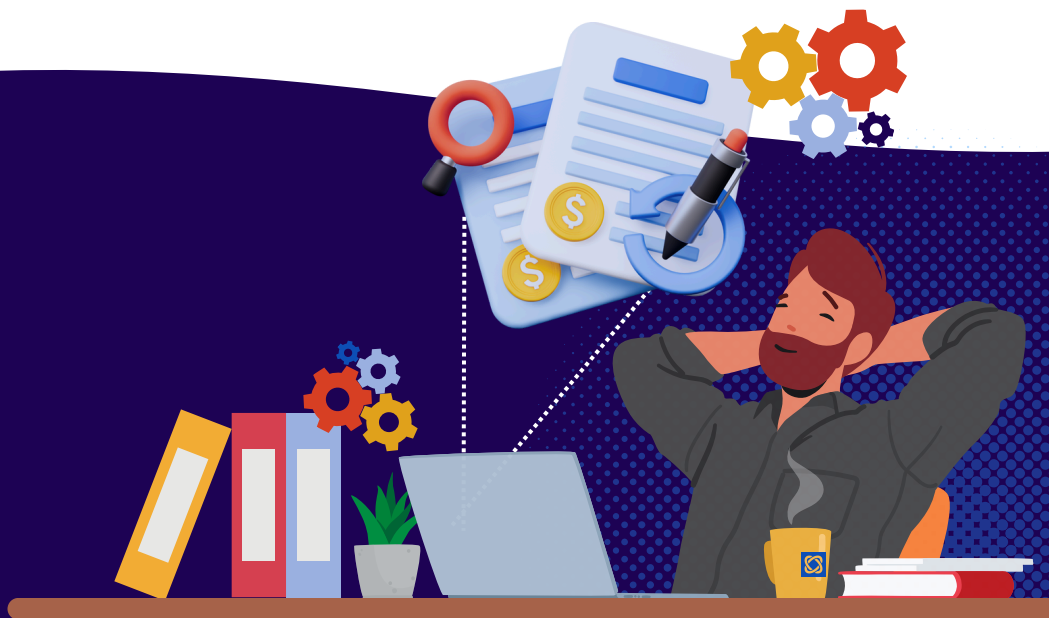
Smarter Contract Management Starts Here

If you're looking for powerful, affordable, and easy-to-use contract management software that will grow with your business, look no further than ContractSafe!

👉 **Schedule a demo today to see ContractSafe in action!**