

An Essential CLM Implementation Framework

Practical Guide to CLM Implementation



DILI TRUST

Introduction

As a legal professional, CXO, or someone closely involved with contracts, you've already recognized the importance of adopting a Contract Lifecycle Management (CLM) solution to optimize the contract process within your organization. You understand the "why", but may be struggling a bit as to the "how".

This guide will walk you through the critical steps for successful CLM implementation, from initial discovery and design to go-live. It outlines proven best practices to ensure a smooth transition and strong adoption. While each implementation is unique, this framework is designed to be adaptable to your organization's specific needs and the CLM solution you choose.



Defining the Contract Lifecycle.

↳ **A CLM solution can simplify the entire contract lifecycle: Request/Intake; Creation; Negotiation; Reviews and Approval; Execution; and Contract Management. It can serve as a source of truth for your organization's contractual obligations, consolidate and unify internal contracting, sourcing and risk mitigation processes, and provide greater visibility and control over your contract portfolio. And, with advanced automation and AI-powered tools, a CLM solution can help you and your organization make data-driven decisions for consistent results.**

However, a successful CLM solution implementation is about more than selecting the right tool. It requires careful planning, collaboration across teams, and active involvement from all stakeholders, including your CLM provider. While complex, implementing a CLM tool doesn't have to be overwhelming. The following is a breakdown of the 6 key phases of software implementation and how they can help you as you look to enhance and automate your organization's CLM processes.

Before we jump into our core topic, let us recap the typical contract lifecycle. It is crucial to have all these steps in mind, as it will help you and your teams define what your implementation process will look like.

Contract Lifecycle Management



1. Request / Intake

Initiation of contract need by business units or stakeholders. Basic contract details and requirements are captured in a standardized intake form.



2. Creation

Drafting the initial version using approved templates and clauses. Ensures alignment with organizational policies and legal standards.



3. Negotiation

Parties review terms, suggest changes, and resolve differences. Redlining and version tracking to maintain clarity and compliance.



4. Reviews and Approval

Internal stakeholders (legal, finance, compliance) assess and validate content. Routing through defined approval workflows based on contract type or value.



5. Execution

Final agreement is signed by all parties (wet signature or e-signature). Legally binding status begins upon full execution.



6. Contract Management

Storage in a centralized repository for access and audit. Ongoing monitoring for renewals, obligations, and performance tracking.

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Glossary

Design

- ↳ **Think of this as the blueprint stage. Before jumping into tools and tech, it's important to get everyone on the same page about your current CLM processes (if any) and where your organization's pain points are. This phase helps uncover what's needed, what's broken, and what can be improved. It's the foundation that ensures the final setup will actually make life easier, not more complicated. And remember you need both process and a tool to develop a CLM solution, which should be your endgame.**

Overview

Objective

To understand business requirements, define success criteria, and architect the CLM solution (process + tool) accordingly.

Key Activities during this phase could include:

- Stakeholder workshops: engage Legal and all relevant stakeholders (i.e., procurement, sales, compliance) involved in contracting to capture requirements for your CLM solution.
- Process mapping: document existing contract workflows, including authority to approve and delegation of authority, contract templates, and pain points/bottlenecks in your processes.
- Gap analysis: compare current workflows with the CLM tool's capabilities to identify necessary customizations and integrations.
- Design blueprint: develop detailed design documents covering workflows, user roles, field mappings, and approval chains.
- Risk & compliance alignment: ensure the CLM solution supports internal policies and external regulations, such as GDPR and SOC 2.

Deliverables from this phase could include:

- Business requirements document (BRD)
- Process diagrams
- Technical architecture overview
- Project plan with milestones

→ Step 1: Assess needs and expectations

It's essential to **gain a clear understanding of the different needs and expectations related to contracts across your organization**. Start by mapping all active contracts, engaging with various teams to uncover their daily challenges, and identifying pain points that need attention. Hosting internal **workshops or meetings can help** align everyone's expectations and ensure a unified approach. During this step **you can also implement internal surveys to gather as much feedback as possible** from the interested users. Make sure to include all the future users of the CLM, by doing so you will be able to **evaluate who the main, secondary and third users** are. Keep in mind that the responsibility lies with you—not the CLM provider—to assess internal processes and collaborate with stakeholders to ensure alignment.

→ Step 2: Set clear and realistic goals

Establish clear, achievable goals that align with your organization's broader objectives and can be realized within a set timeframe. Your CLM provider, supported by a dedicated project manager, will guide you through this process. **Starting small doesn't mean you lack ambition—consider a phased approach**, beginning with a minimum viable scope in terms of use cases and departments, and then gradually expand, phase by phase, as you build momentum. Your goals can look like anything such as “% of new contracts signed in less than 48 hours” or “reducing clause errors on certain type of contracts by half”. **One of the most common goals is time saving**, and as much as a CLM will drastically improve this aspect, keep in mind that a realistic goal is closer to “spending 2 days per month reviewing contracts” rather than spending 20 minutes per month.

→ Step 3: Identify key integrations

Take a close look at your organization's digital ecosystem to identify the tools your CLM solution should integrate with. **Focus on the integrations that are most critical to your business**, such as syncing with e-signature tools, CRM platforms, or ERP systems. Just like the features, it is possible your teams will need integrations to other tools as they grow, and as the CLM scope of use evolves. The key integrations are the needs and not the nice to have. For instance, if you know some teams work with freelancers on a regular basis, you likely need efficient collaboration across platforms including external parties. Then you know it is essential for you to have a Microsoft 360 or Google integration to work with your freelancers. **The use cases you may have taken out from the initial phases of the design process will help you** bring to light the critical integrations and their order of priority.



→ Step 4: Define KPIs

Whether it's contract processing speed or the number of contracts signed each week, setting KPIs helps you track success and pinpoint areas for improvement. **With clear metrics in place, you can assess the performance of the CLM tool after implementation**, making it easier to drive adoption and ensure the tool delivers real value.



What about features?

Identifying the features of the CLM system that align with your goals is key. Whether its clause reviews, contract status tracking, or clause anomaly detection, defining these features early sets the stage for a more efficient configuration phase. However, these features must be identified prior to purchase, as not all solutions offer features on demand. But don't worry - if you've covered your essential needs in the first step, you'll have a clear understanding of the must-have features. With that you'll be off to a strong start when implementing your solution.

Building strong project governance

Strong project governance is crucial. How it's set up has a direct impact on the success of your CLM implementation. **Clearly defining roles and responsibilities is key**, and using a RACI matrix can help ensure accountability and clarity.

Regular governance meetings, like weekly reviews, should focus on tracking actions, monitoring progress, and identifying potential risks. **For larger projects, steering committees may be needed** to oversee high-level decisions, manage risks, and maintain alignment across all stakeholders.



Structuring the project team

A **strong internal project team is essential** for successful implementation. Bring together an IT project manager, project sponsor, key users, and technical experts to drive the project forward and ensure deadlines are met. Close collaboration with the CLM project manager, **along with clear communication, defined roles, and the right mix of skills and expertise**, are key to keeping everything on track.



Here's an overview of the key roles to consider for the project:

Client Team project	Responsibilities
Project Sponsor	<ul style="list-style-type: none">• Plays a pivotal role in championing the success of the project by advocating for internally. They actively support the transformative processes and facilitate effective communication during periods of change.• The sponsor serves as a point of contact for project escalation, particularly in cases where issues or delays arise may be attributed to the client. Their commitment to project success positions the sponsor as a key liaison between internal stakeholders and project teams, ensuring a cohesive and well-coordinated approach.
Business Project Manager	<ul style="list-style-type: none">• Assumes a crucial role in overseeing project management, coordination and resource allocation within the organizational framework.• Collaborates closely with the Provider Project Manager, they work hand-in-hand to actively coordinate various facets of the project. This collaboration involves strategic planning, efficient resource utilization, and seamless coordination to ensure the project progresses according to plan.
Technical Contact	<ul style="list-style-type: none">• Integration processes and discussions related to the implementation of API connectors or single sign-on (SSO).• Their responsibilities extend to oversight of the seamless retrieval of databases from previous platforms and they orchestrate the transfer of client data into the standardized templates if the provider has any. This critical intervention ensures smooth integration and enhances data interoperability.

Provider Team project	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> • Their mission encompasses strategic organization, meticulous planning, and effective coordination of the Provider functional and technical teams. • Orchestrates the collaborative efforts of these teams, aligning their tasks and objectives with the overarching goals of the project. They act as a bridge between the provider and the Client. • The Project Manager's responsibilities extend to optimization of resource utilization, timelines management and oversight of the overall project trajectory to deliver outcomes that meet or exceed the Client's expectations.
Account Manager	<ul style="list-style-type: none"> • Contributes to maintain alignment with the client's expectations mid-term and long term and ensures a comprehensive understanding of the envisioned outcomes. • Their involvement serves as a valuable reminder of the strategic objectives driving the client's investment, fostering transparency and reinforcing the collaborative partnership between the client and the provider throughout the project lifecycle.
Technical project manager	<p>Contact person for technical topics such as SSO, electronic signature connectors, and API-related questions.</p>
Data Project Manager	<ul style="list-style-type: none"> • Manages the project aspect related to data. migration, whether it involves data extraction or data import. • Defines the scope and challenges. • Manages the analysis when taking over the existing contract. • Ensures the acceptance of the data extraction with the Customer.

Digital transformation can be tough, especially when there's resistance to change or concerns about security. That's where the project sponsor comes in—playing a key role in driving the initiative, addressing concerns, and ensuring full buy-in, ultimately making the change smoother and more successful.

Expected outcomes

By the end of the design phase, your organization should have achieved the following:



Priority use cases and workflows: identify and prioritize 3 to 4 key use cases and workflows for the initial implementation phase. Use visual aids, such as flowcharts or diagrams, to map out these workflows and their trigger criteria.



Clear view of features and processes to implement: list the key features and processes within the CLM solution that align with your prioritized use cases and workflows.



RACI matrix for roles and responsibilities: create a RACI matrix outlining the roles and responsibilities of everyone involved in the implementation, including internal stakeholders and resources from the CLM provider.



Implementation timeline: draft a realistic project timeline with clear milestones and deadlines for deliverables. Avoid a big-bang implementation. Begin with small, high impact use cases to demonstrate value early, allowing your teams to adapt gradually while reducing risks.

*While the CLM provider will offer guidance and support during critical moments of the design phase, **the responsibility for defining needs, aligning stakeholders, and preparing internal processes lies within your organization.** Taking ownership of this phase is crucial to ensuring a successful implementation.*

Configuration



Once you know what you need, it's time to tailor the tool to your specific workflows. Configuration means setting up the contract types, approval steps, and who's allowed to do what. This isn't about coding; it's about setting rules and preferences so the tool reflects how your team already works (or wants to work better). Remember, the goal is to make things smoother, not introduce a whole new way of doing business.

Overview

Objective

Set up the CLM system according to the defined design and organizational needs.

Key Activities during this phase could include:

- User role configuration: define user roles, access controls, and permissions.
- Template management: upload and configure standard contract templates, or set them up your new tool.
- Workflow setup: implement contract creation, review, approval, and execution workflows to mirror your organizations desired contract lifecycle.
- Clause library: develop and tag standard and alternate clauses for easy reuse.
- Integration setup: connect the CLM with systems such as CRM, ERP, eSignature, and document repositories (e.g., Salesforce, SAP, DocuSign).

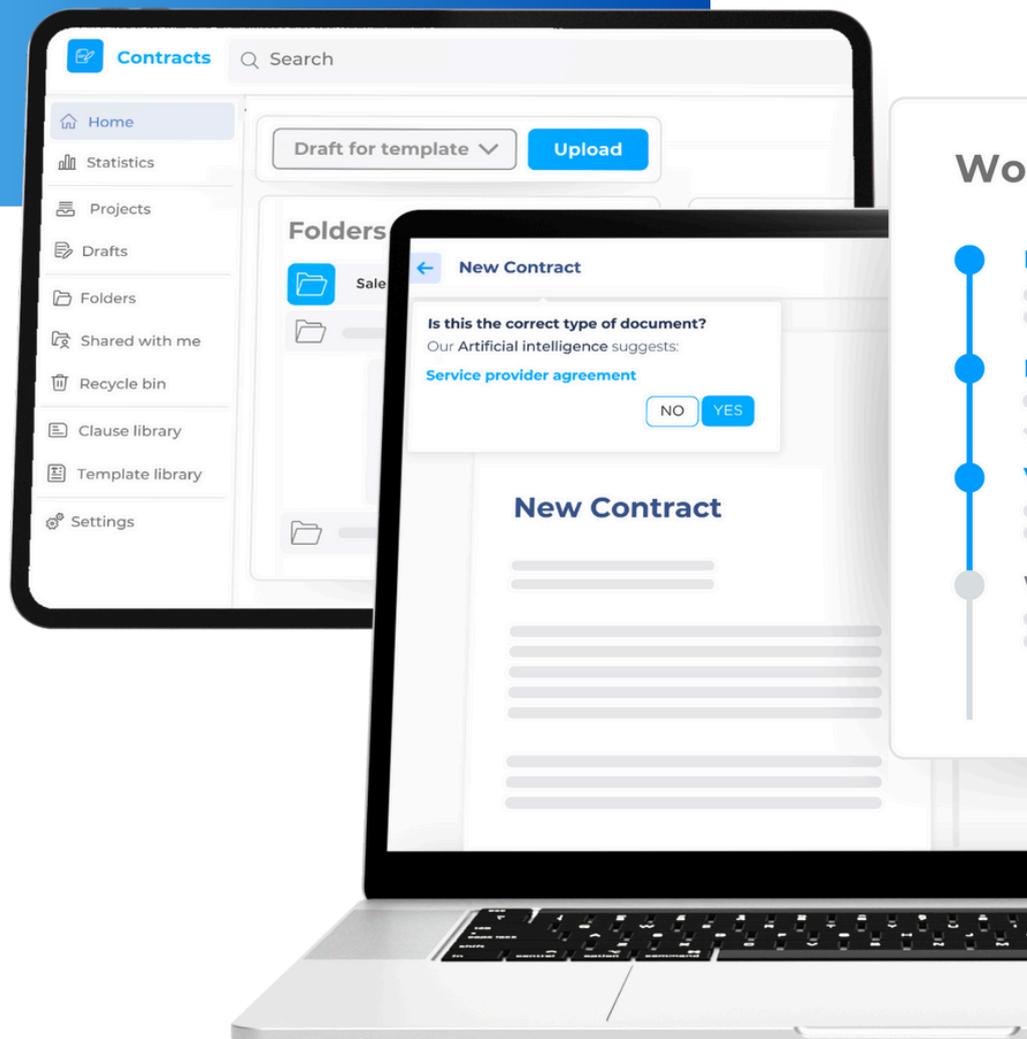
Deliverables from this phase could include:

- Configured CLM tool instance
- Clause & template libraries
- Integrated system APIs
- Audit & approval trail configuration



Careful with the big bang

Avoid a big-bang approach during the configuration phase. **Starting small and adjusting as you go is a more effective strategy for the configuration phase.** Begin with basic deployment, focusing on essential features and critical integrations. Then, test as the configurations go rather than waiting until everything is configured. This will also prove efficient to help users get accustomed to the new tool. Gradually expand with advanced settings and additional systems over time.



Setting up the tool

Leveraging insights from the design phase, the provider will configure the CLM solution to align with your organization's needs. **This process consists of two main stages:**

↘ INITIAL SETUP:

- **Folder structure:** Organizing contracts and related documents into a clear, logical structure for easy navigation.
- **User access control:** Defining access permissions for specific folders, document types, and contract templates to maintain security and streamline workflow management.

↘ ADVANCED SETUP:

- **Workflows:** setting up approval workflows according to contract types, ensuring compliance with internal policies.
- **Notifications and alerts:** configuring automated notifications and alerts to keep stakeholders informed at critical stages of the contract lifecycle.
- **Contract templates and clause library:** creating contract templates by type, summary sheets, and a clause library for consistent and efficient document creation.
- **Setup of contracts summary sheets** – if you've selected a CLM provider that offers AI-powered capabilities.
- **Reports and dashboards:** configuring reports and dashboards to provide real-time insights into contract performance and lifecycle status, such as tracking expiration dates, monitoring approval timelines, and measuring compliance metrics.

Some CLM solutions offer AI-powered features to help you configure the settings.

Pro tip

How to establish efficient workflows?

- Create **use case scenarios**.
- Identify the most important scenarios to prioritize during the implementation.
- **Identify trigger criteria** – sometimes the desired path is very clear, but the trigger isn't. Ask your team "when do we need X or Y to sign?" The trigger criteria can be contracts containing specific clauses such as DORA related contractual obligations, or simply, amounts, such as contracts over 20 000 € need X's approval.
- Put the workflows in place, **monitor efficiency**, eventually, and adjust as needed.

Integrating with existing tools

Integrating your CLM solution with your existing tools and systems is essential to maximizing efficiency.

Many CLM providers support integrations with:

- E-signature providers: such as DocuSign, Adobe Sign, or HelloSign.
- Office suites: including Google Workspace and Microsoft Office.
- SSO providers: like Okta, Azure AD, or Ping Identity.
- CRM platforms: such as Salesforce, HubSpot, or Zoho CRM.
- ERP systems: including SAP, Oracle, and Microsoft Dynamics 365.
- Document management systems: such as SharePoint, Box, or Dropbox.
- Legal research tools: like LexisNexis or Westlaw.
- Procure-to-Pay (P2P) systems: like Coupa or Ariba.
- Project management tools: including Asana, Trello, and Jira.

Integrating with other tools can bring technical challenges. Compatibility issues may arise when different tools use varying data formats, APIs, or versions, making synchronization tricky. Security is also a concern, as ensuring all integrated tools meet the same data protection standards may require extra effort. Some integrations might need custom development, adding complexity and costs. Plus, integration support can vary, potentially causing delays or downtime when problems occur.

To address these challenges, **it's essential to define which system holds the master data for each type of information.** Doing so ensures data consistency across platforms, prevents duplication, and minimizes errors.

To overcome integration challenges, plan ahead, collaborate closely with your CLM provider and technical team, and address potential issues early on.

Expected outcomes

By the end of the configuration phase, your organization should have achieved the following:

- **Fully configured CLM solution:** the core CLM solution is set up and ready to go, with essential features, workflows, and integrations tailored to your organization's specific needs.
- **Operational workflows:** approval processes, contract routing, and other important workflows are automated and running as planned.
- **Integrated key tools:** critical tools such as e-signature providers, CRM platforms, and ERP systems are successfully integrated.
- **Access control:** roles and permissions are clearly defined, ensuring the right people have access to the appropriate documents and features based on their responsibilities.

Configure your CLM solution with scalability in mind, ensuring it can easily adapt to future needs, new integrations, and organizational changes as they arise.

Data

- ↙ This is the "packing and moving" phase, where you bring over all your old contracts into the new digital space. But instead of throwing everything into a box, you're sorting, cleaning, and organizing it along the way. It's important because good data fuels smart automation and searchability. If you skip this, you might end up with a shiny new system filled with messy, inaccurate and/or obsolete information.

Overview

Objective

Transfer legacy contracts and related metadata into the CLM tool.

Key Activities during this phase could include (depending on your context):

- Data assessment: inventory and classify existing contracts across departments and systems.
- Data cleansing: remove duplicates, correct errors, and standardize formats.
- Field mapping: map legacy contract metadata fields to the CLM system schema.
- Import scripts: develop and run automated scripts or use migration tools to load data.
- Validation: conduct post-migration checks to ensure completeness and accuracy.

Deliverables from this phase could include:

- Data migration plan or data recovery plan
- Cleaned and structured dataset
- Data mapping matrix

*Additional considerations for the Data phase:
Involve technical experts and legal representatives to check data accuracy, making sure it's both reliable and compliant.*

Option 1 [Data import]: If you are transitioning from another CLM solution

If you're moving from an existing CLM solution, the new provider will typically require you to provide relevant data for import into the new system.

HOW TO PREPARE

Your new CLM provider will **typically request data in CSV or Excel** formats, including contract metadata—contract IDs, types, parties involved, start and end dates, payment terms, and other relevant fields. **You'll also need to provide data mapping** to ensure the information aligns properly with the new system's structure.

COMPLEXITY LEVEL

The complexity of migration **largely depends on the organization and cleanliness of your legacy data**. Investing time in removing duplicates, correcting errors, and standardizing formats can significantly reduce challenges and ensure a faster transition.

Workflow 1



EXTERNAL REVIEW ST



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SIG

WAITING FOR VALIDA



Meeting Minutes



Is this the correct type of document?

Our Artificial intelligence suggests:



Option 2 [Data extraction]: **If you've never had a CLM system in place**

For organizations without an existing CLM system but with a significant volume of contracts stored using platforms like SharePoint or Google Drive, data extraction is necessary. The new provider will extract the relevant information from these documents and migrate it into the new CLM system.

HOW TO PREPARE

You should collaborate closely with your provider to **define the scope of the migration. This involves determining the number of contracts, the types** of contracts, and the specific data fields or clauses to be extracted from the legacy contracts. The ball is on your court as only your organization can know what is needed to make the contract strategy move forward.

COMPLEXITY LEVEL

The complexity of data extraction largely **depends on the state of your contract storage:**

- If your contracts are well organized with consistent formatting, the process will be more straightforward.
- If your contracts are stored inconsistently—with varied formats or incomplete metadata—the process can get tricky. You'll need to clean, organize, and identify the necessary data to ensure smooth integration into the new system.

Check if your CLM solution offers AI features for migration. These features can help automate data extraction, mapping, and ensure smoother data transitions, ultimately saving time and reducing the risk of errors during the migration phase.

The essentials for success

CLEAN YOUR DATA:

While the **CLM provider** will work with the data you provide, they **won't handle the cleaning process**. Some providers may offer workshops, but it's important to allocate internal resources for this task. **Conduct a thorough audit of your contracts to address inconsistencies**, fill information gaps, and standardize terms and clauses. **Ensuring data quality before migration is key** to minimizing errors and preventing the transfer of incomplete or problematic data to the new system.

INVOLVE KEY EXPERTS

Include a technical contact to oversee data retrieval and ensure efficient coordination with the provider. Additionally, **involve legal representatives** to review and validate the accuracy and quality of the data being migrated. **Their combined expertise is critical** for maintaining data integrity and compliance.

CONDUCT A COMPREHENSIVE REVIEW

Assess your existing contracts and data thoroughly, both before and during migration. **Regular reviews help catch and correct potential errors**, ensuring that only accurate, high-quality data makes it into the new system.

BACK UP YOUR DATA

Before migration, create a secure backup of your legacy data. This ensures access to historical information if needed later in the implementation process. **Remember, during the initial stages of migration, the data available in the new tool may be limited** or incomplete.

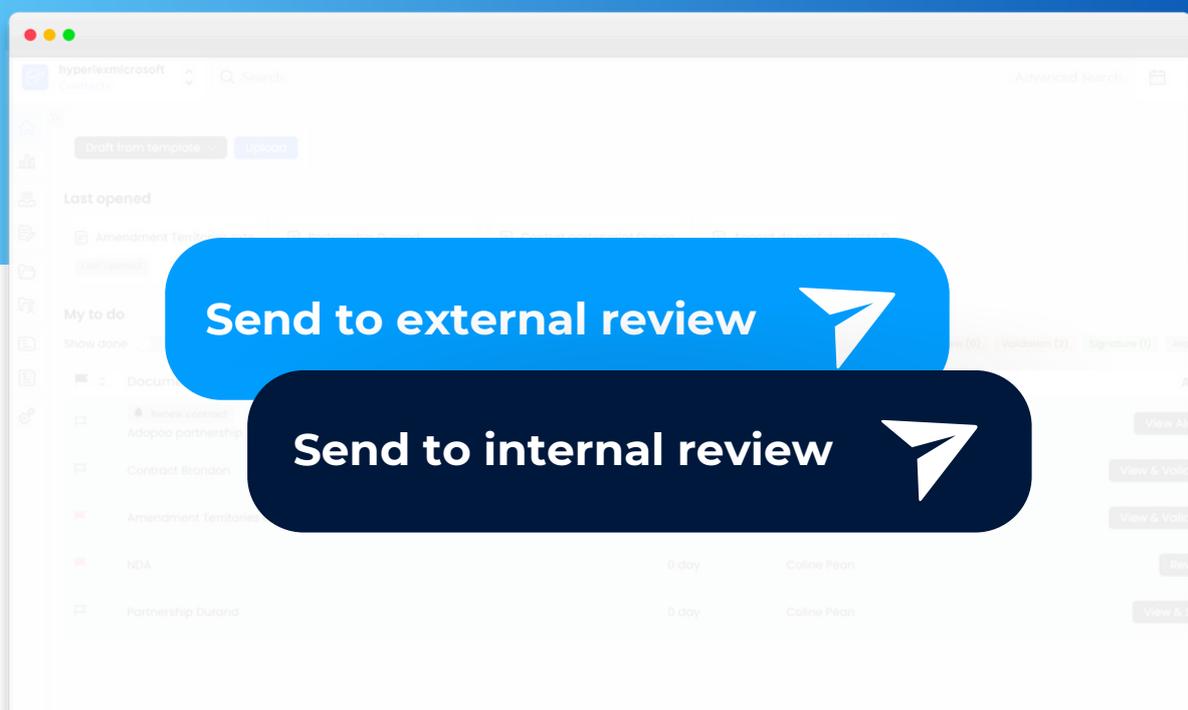
Expected outcomes

By the end of the data-recovery phase, your organization should have achieved the following:

- **Accurate data migration:** all the relevant data—whether imported from a previous CLM system or extracted from legacy contracts—has been successfully migrated and mapped into the new CLM solution with accuracy and completeness. Historical contracts and associated data are now readily accessible within the platform.
- **A detailed rollout plan:** together with your CLM provider, you've established a **clear migration plan tailored to the quantity and complexity of your data.**

Two options are available:

- **A complete migration with testing:** for smaller data sets, migrating everything at once and conducting thorough testing after integration.
- **A phased migration:** for larger projects, the migration follows an order of priority and there are tests after each implementation rather than all at once in the end.



Testing



Think of testing as your practice run before a big event, like rehearsing a play. You want to make sure everything works the way it should: buttons do what they're supposed to, workflows flow, and nothing breaks under pressure. It's your chance to catch bugs or confusing steps before everyone starts using the system for real. It's also when you get to say, "Yep, this feels right."

Overview

Objective

Validate system functionality, integrations, workflows, and data accuracy.

Key Activities during this phase could include:

- Unit & system testing: verify each module's functionality in isolation and end-to-end.
- User acceptance testing (UAT): select end-users to simulate real-world scenarios and provide feedback.
- Performance testing: assess the system under load, especially with large contract volumes or concurrent users.

Deliverables from this phase could include:

- Test plans & scripts
- UAT sign-off documents
- Issue/bug tracker
- Final functional test report

Onboarding



Here's where the magic happens—teaching your team how to use the new system with confidence. Even the best tool is useless if people don't understand it or feel frustrated using it. Onboarding is all about training, support, and clear communication so no one feels left behind. When done right, it turns skeptics into champions and helps the whole team embrace the change.

Overview

Objective

Ensure user readiness and operational alignment before launch.

Key Activities during this phase could include:

- Training programs: Develop and deliver training materials (manuals, videos, live sessions) tailored by role.
- Change management: Communicate benefits, new workflows, and support processes to drive adoption.
- Support readiness: Establish escalation procedures and ticketing system - whether internal or with your provider.
- Pilot group launch: Initiate a soft rollout with a select user group to test readiness and gather feedback.

Deliverables from this phase could include:

- Training curriculum & materials - either from the service provider or created in-house
- Communication plan for rollout
- Helpdesk SOPs

Change management efforts should be at their peak during this phase—helping users get comfortable with the new system, tackling any challenges, and ensuring a smooth transition to full adoption.

Training

Your **CLM provider will typically focus on training the key users so that they can pass on the knowledge**, such as key stakeholders like sponsors, key users, and administrators. These individuals will become system experts and internal champions, guiding the other teams through the transition.

Depending on your company size and the number of users intended to use the tool, the CLM provider will either:

- **Train all users if it's a small group, likely at the same time.** While team members may use the CLM differently, **training everyone together helps collaborators understand how their colleagues utilize the tool** and the challenges they may encounter.
- **If teams are too large, they will use a "train the trainer" approach.** This method focuses on training a small group of key users who are well-positioned internally to pass on the learning and best practices. This **ensures knowledge is effectively spread** throughout the organization, which is particularly valuable in large-scale implementations.

For a successful training rollout, develop a detailed plan based on the use cases identified during the design phase. Begin by identifying user groups and target audiences and customize training sessions to meet their specific needs and roles, focusing on the relevant use cases. **Integrate hands-on testing exercises within the training** to provide practical experience, allowing users to explore real use case scenarios and better grasp how the system works.

Documentation

Creating comprehensive **documentation is key to helping users fully understand and make the most of the CLM tool's capabilities.**

This documentation should include:

- **Process documentation:** clear instructions on approval workflows, contract creation processes, and automation rules. These are to be documented internally.
- **FAQs:** answers to common questions and solutions to typical issues users may encounter, usually the CLM provider will hand this over or share access to a dedicated page.
- **Best practices:** practical tips and guidelines for optimizing contract management processes.

Build documentation progressively during the configuration phase rather than waiting until the end. This approach ensures that users have access to the relevant materials as features are rolled out. Many CLM solutions offer templates to simplify the documentation process and make it easier to record and share essential workflows and rules.

#protips
#Solution

Feedback

Collecting feedback from users should be an ongoing process. Regularly gather insights on challenges, usability issues, and suggestions for improvement.

Organize feedback by **categorizing comments into key themes or topics and prioritize the most critical issues** based on their impact and frequency. Use this information to **guide future optimizations and system enhancements.** Sharing regular updates on how feedback is being addressed will help maintain user engagement and demonstrate that their input is valued.

Expected outcomes

By the end of the onboarding phase, your organization should have achieved the following:

- **Key users as official trainers:** each time a new feature or module is deployed, these **champions train the new users, ensuring successful transition** and consistent knowledge transfer.
- **Access to comprehensive, up-to-date documentation:** all users have access to clear, practical, and well-organized documentation, **including process guides, step-by-step tutorials, FAQs**, and best practices.
- **Real-life scenarios are tested:** real-life scenarios, like contract approvals, clause updates, and e-signature processes confirm the solution meets daily operational requirements and ensures it works as expected in practice.
- **Valuable user feedback: users feel confident and empowered to provide constructive feedback** on system usability, challenges, and potential improvements. This feedback should be collected regularly and used to drive system optimizations as you move forward with the implementation.

Don't underestimate change management. This should not be a one-time activity but an ongoing effort that begins in the design phase and extends through onboarding and go-live. Reinforce the change with regular updates, success stories, and visible leadership support to encourage adoption and engagement.

#protips

#Solution

5 tips for effective change management:



Communicate early and often:

Keep stakeholders informed with regular updates to build excitement and reduce uncertainty.



Leverage success stories:

Share early wins to demonstrate the tool's value and motivate others.



Visible leadership support:

Ensure leaders and the project sponsor actively advocate for the change to show its importance.



Ongoing training and support:

Offer continuous training and resources to boost confidence and adoption.



Encourage and act on feedback:

Regularly gather and act on user feedback to drive engagement.

Go-live

- ↙ **This is the big day: your CLM solution officially goes from project to reality. You've done the planning, testing, and training, and now it's time to switch it on and start using it in daily life. The key here is to stay close to the users, fix hiccups quickly, and keep improving as you go. And remember, go-live is not the end—it's the beginning of working smarter with contracts.**

Overview

Objective

Transition the system into full production use with ongoing monitoring and support.

Key Activities during this phase could include:

- Final deployment: Final data extraction (if you opted for data recovery rather than migration), switch to production environment, and activate user access.
- Hypersupport: if available and chosen in your support options, be prepared for an intensified support for the first 2–4 weeks post-launch to handle issues.
- Performance monitoring: track KPIs such as contract cycle times, user adoption, and error rates.
- Post-Go-Live review: conduct a retrospective to evaluate success and areas for improvement.

Deliverables from this phase could include:

- Go-Live checklist
- Support SLA documentation
- Go-Live summary meeting with service provider

Key to success: Treat this phase as a team project, not an IT task. With the right preparation and support, your CLM tool will help reduce risk, save time, and make your contract process way more efficient.

At this stage, **a handover takes place between the project manager and the account manager.** The account manager becomes your primary point of contact. The account manager is **key to ensuring long-term success**, offering ongoing support, addressing new requirements, and gathering feedback to optimize the solution as your organization's needs evolve.

In some cases, the CLM project manager may stay involved for the first 2-3 months after go-live. This transitional period helps ensure a smooth handover, with the project manager introducing the account manager, assisting with troubleshooting, and resolving any immediate post-launch issues.

Go-live can be phased in to reduce risk. By gathering feedback from the first user group, you can make adjustments to the tool and ensure faster adoption for the next group of users.

Monitoring

Once the solution is live, it's essential to monitor its adoption and performance to ensure that it delivers on expectations.

- **Track user adoption:** assess how teams are using the system in their daily tasks. **Identify any areas where additional training or clarification might be needed** to improve confidence and productivity.
- **Monitor system performance:** keep an eye on system responsiveness, workflows, and integrations to ensure everything operates smoothly. **Address any technical issues** promptly to avoid disruption.
- **Measure against KPIs:** evaluate the system's performance against the KPIs defined during the design phase. Metrics such as contract cycle time and compliance tracking will help **measure success and pinpoint opportunities for improvement.**

Spot quick wins and share them to showcase the tool's value to teams. Sharing these successes not only builds momentum but also drives continued adoption throughout the organization.

Expected outcomes

By the end of the go-live phase, your organization should have achieved the following:

- **Full system access for all users:** the CLM solution is fully accessible to all users, not just key stakeholders, enabling teams across the organization to manage contracts efficiently as part of their daily workflows.
- **Initial adoption across teams:** teams are actively using the CLM solution, with workflows, templates, and automated features integrated into their processes. Early user engagement sets the foundation for broader organizational adoption.
- **Validated system performance:** core functionalities, integrations, and workflows operate smoothly, with no significant issues. System performance and user experience are monitored closely to identify and resolve any early concerns.

The go-live phase is not the end of your CLM journey—it's just the beginning. You will need to keep it running, what does it mean? Review and refine workflows over time, gather user feedback to make the CLM evolve, update and add contract templates and feed the clause libraries. To sum it up, keep it living.

Workflow



EXTERNAL REVIEW STARTED



EXTERNAL REVIEW COMPLETED



INTERNAL REVIEW STARTED



INTERNAL REVIEW



Conclusion

↙ **We've covered several key phases of your CLM implementation journey: the design phase, where you assess needs and set clear objectives; the configuration phase, where the system is customized and integrated with your tools; the the testing phase where you confirm your configurations work; the data migration phase where legacy data is transferred; and the onboarding phase, where users are trained and engaged in hands-on testing. Finally, the go-live phase marks the official launch, fully integrating the solution into daily workflows and monitoring performance for ongoing success.**

Each of these phases is critical to ensuring successful implementation. **By managing each step effectively and prioritizing change management throughout, you can guarantee long-term success** and continuous optimization of the CLM solution to meet your organization's evolving needs.

As you move forward, **DiliTrust offers an intuitive, AI-powered CLM solution** designed to streamline contract management processes. With seamless integrations, robust automation, and a secure, compliant environment, DiliTrust helps you manage contracts with ease.

Ready to take the next step? [Book a meeting with us](#) today to discover how DiliTrust CLM can be tailored to your organization's needs and drive your contract management success.

Glossary

API (application programming interface)

A set of rules and protocols for building and interacting with software applications, allowing different systems to communicate with each other.

Contractual database

A secure, centralized repository that organizes and analyzes contract data, enabling easy access, streamlined management, and actionable insights.

E-signature

A digital form of signing documents electronically, ensuring authenticity, security, and legal validity.

RACI matrix

A framework that defines roles and responsibilities in a project or process by categorizing individuals as Responsible, Accountable, Consulted, or Informed.

SSO (single sign-on)

A user-authentication process that allows users to access multiple applications with one set of login credentials.

System performance:

The measure of how efficiently and effectively a software system operates, including speed, reliability, and scalability.

Data mapping

The process of linking data fields from one system to corresponding fields in another to ensure accuracy during data transfer and integration.

Contract Manager

A role responsible for overseeing the lifecycle of contracts from creation, negotiating, validating and execution. They manage contractual risks and set best practices to align business demands with contractual objectives and needs.

Validation workflow

A structured process that automates and streamlines approval steps, enabling sequential or parallel validations while ensuring compliance with internal rules.

DiliTrust's CLM

↳ Leverage the power of advanced AI, with user-friendly features, for a secure and streamlined journey through the contract lifecycle with DiliTrust's CLM.

EASILY STREAMLINE CONTRACT ACTIVITIES

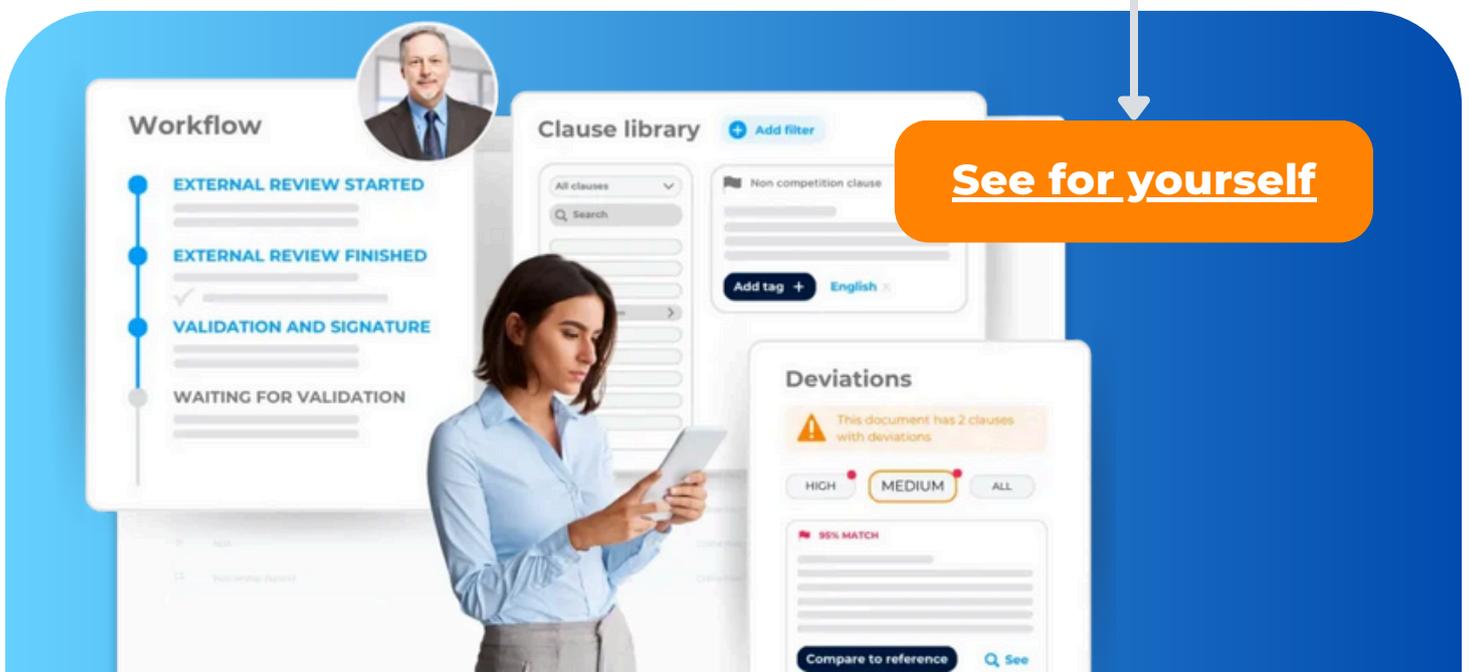
Designed for simplicity, our platform ensures smooth and user-friendly contract management for everyone. From importing documents to creating customized contracts, every step of your contract lifecycle is optimized for efficiency. Say goodbye to manual processes and hello to streamlined contract management with the platform that thousands of users already use every day.

ADAPT DILITRUST TO YOUR BUSINESS NEEDS

We offer adaptability for managing the contract lifecycle. You can customize features and workflows, adjusting DiliTrust to your organization's unique needs. Whether you need task automation, personalized contracts, or team collaboration, our CLM solution provides the flexibility you need to meet your business operation needs.

RELIABLE AND SECURE DATA

The security and reliability of your contract data is our top priority. Our solution ensures both data security and reliability. With our unique encryption method, native SSO integration, and proprietary artificial intelligence we implement advanced security measures to protect your contract data and make it actionable in your information system.



[See for yourself](#)

WE HOPE YOU ENJOYED THIS GUIDE



**We'd love to hear
from you!**

Visit our website www.dilitrust.com to download more content like this or [get in touch with our team to discover our Contract Lifecycle Management solution.](#)

About DiliTrust

DiliTrust is a global provider of AI-powered SaaS solutions dedicated to empowering in-house legal teams by giving back valuable time and peace of mind.

Leveraging its proprietary AI, DiliTrust secures and streamlines legal operations, allowing teams to focus on strategic decision-making and maximize their impact within the organization.

The DiliTrust Governance suite enables legal departments to efficiently manage the entire contract lifecycle, centralize entity management, secure board meetings, and maintain control over matter management. Supporting more than 2,500 businesses across over 60 countries, DiliTrust has a presence in key locations, including Canada, Dubai, France, Germany, Italy, Mexico, Spain and the United States.

Committed to fostering simplicity, innovation and security, DiliTrust helps legal departments work smarter while enhancing operational efficiency and minimizing risk. Discover more at www.dilitrust.com.