Swiftwater & COMPANY



CONTRACT LIFECYCLE MANAGEMENT TEMPLATE

Contract Lifecycle Map Template

See how contracts really move before you change anything

Why do this first?

Find where contracts stall

Most delay sits in the handoffs between teams. A map puts them where everyone can see them.

Buy the right system

Requirements, readiness, and the platform decision all read off the map.

Get teams on one page

Sales, procurement, legal, and IT finally look at the same picture of the work.

Includes a worked example and reusable worksheets for legal, sales, and procurement. · swiftwaterco.com

BEFORE YOU START

How to use this template

A finished map shows every stage, its owner, its system, its handoffs, and its gaps in one view anyone in the organization can read.

For each stage, record who owns it, what system it runs in, where the work hands off, and where it commonly breaks. Spend the most time on the handoffs, because that is where contracts sit waiting.

> **HOW TO RUN THE MAPPING**
>
> Talk to the people who do the work as well as the people who manage it.
>
> Bring in sales operations for the sales side, procurement for the buy side, legal and legal operations for drafting and governance, and IT or platform owners for what the systems really do.
>
> Interview each group about its own part of the process. In one large workshop, the loudest voice tends to set the story.

The next page is a worked sales example. It is illustrative, so replace it with what happens in your organization. The blank worksheets after it cover legal, sales, and procurement workflows. Copy them and use them as many times as you need, one contract type or business unit at a time.

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WORKED EXAMPLE · ILLUSTRATIVE

Sales contract

Stage	Sales and sales ops	Legal and legal ops	Business owner	IT or platform owner	System	Handoff	Common gap
1. Request and intake	Requests the contract from the opportunity	Triages the request	Confirms what was sold	Maintains the link from CRM to CLM	Salesforce, CPQ	To authoring, then CLM	Request never structured, lives in the deal
2. Authoring and drafting	Supplies deal details	Drafts from the approved template	Answers scope questions	Keeps template data flowing	CLM	From intake systems	Incomplete context leads to back-and-forth delays
3. Negotiation and redlining	Manages the customer relationship	Leads the redline, following the playbook	Decides commercial points	Supports version tracking in CLM	CLM	Back and forth with counterparty	Versions tracked over email
4. Review and approval	Gets deal desk sign-off	Approves legal positions	Approves commercial terms	Maintains the routing rules	CLM or workflow	To signature	No routing rule, approvals wait
5. Execution, signature, and storage	Sends for signature	Confirms the final version	Signs	Connects e-signature to CLM	E-signature	To repository	Executed copy never reaches the CLM
6. Obligations and performance monitoring	Tracks customer commitments	Orchestrates and reports	Performs the obligations	Maintains alerts	CLM	Alerts to owners	Obligations stay trapped in the sales system
7. Renewal, renegotiation, or termination	Leads the renewal conversation	Reviews the terms if they change	Decides to renew, renegotiate, or terminate	Maintains renewal reports	CLM	Back to request and intake	Renewals surface only at invoice time

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TEMPLATE 1

Legal contracts workflow

Use for work that starts with legal or comes to legal directly, such as NDAs, third-party paper, and amendments. Requests often arrive by email or an intake form.

Stage	Requester	Legal ops	Attorney or contract manager	Approver	System	Handoff	Where it breaks
1. Request and intake							
2. Authoring and drafting							
3. Negotiation and redlining							
4. Review and approval							
5. Execution, signature, and storage							
6. Obligations and performance monitoring							
7. Renewal, renegotiation, or termination							

TEMPLATE 2

Sales contracts workflow

Use for customer agreements. These usually start in the CRM, close to the opportunity and the quote.

Stage	Sales rep	Sales ops or deal desk	Legal and legal ops	Finance	System	Handoff	Where it breaks
1. Request and intake							
2. Authoring and drafting							
3. Negotiation and redlining							
4. Review and approval							
5. Execution, signature, and storage							
6. Obligations and performance monitoring							
7. Renewal, renegotiation, or termination							

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TEMPLATE 3

Procurement contracts workflow

Use for supplier agreements. These usually start in a procurement or service platform such as ServiceNow, SAP, or Coupa.

Stage	Business requester	Procurement	Legal and legal ops	Finance or risk	System	Handoff	Where it breaks
1. Request and intake							
2. Authoring and drafting							
3. Negotiation and redlining							
4. Review and approval							
5. Execution, signature, and storage							
6. Obligations and performance monitoring							
7. Renewal, renegotiation, or termination							

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NEXT STEPS

Map your process, then improve it

These worksheets are yours to reuse. Map your current process one contract type, region, or business unit at a time, and copy the pages as often as you need. Start with what happens today, including the workarounds, because a map of how things are supposed to work will not show you much.

When you have mapped a few, compare them. The same problems tend to show up more than once: an approval nobody owns, a signed contract that never reaches the repository, a renewal date that lives in one person's calendar. Those repeats are a good place to start.

Some gaps need no technology at all, and a clear routing rule or a named owner can be put in place quickly. Others point to a system decision, and your maps become the basis for requirements. They show which integrations matter, which teams need access, and which contract types to bring on first.

Keep going

- What Are the Core CLM Requirements Themes Before You Write an RFP?
- Is Your Team Ready for CLM? Readiness and Change Management
- The 7 Stages of Contract Lifecycle Management

Hire a practitioner to speed this up. Mapping takes time, and it is hard to spot what is normal from inside your own process. A Swiftwater practitioner interviews each team, builds the maps with you, and brings in common industry best practices, so you get to a better process sooner. The CLM Discovery Sprint is a fixed-fee 4 to 6 week diagnostic.

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