Swiftwater & COMPANY

CONTRACT LIFECYCLE MANAGEMENT CHECKLIST

NDA Intake and Routing Checklist

Set up self-service NDAs and send only the exceptions to legal

Use this checklist to design an NDA process that the business can run on its own within rules legal has approved. Routine NDAs get signed faster, and lawyers get their time back for the work that needs them.



BEFORE YOU START

How to use this checklist

Work through the sections in order with legal, legal operations, and the teams that request NDAs most often. Use it again each time you add a business unit, a template, or a new tool. The examples are illustrative, so replace them with your own.

> **READ BEFORE USING**
> This checklist is provided for general informational purposes only and is not legal, financial, or business advice. NDA and contract decisions should be validated against your organization's specific structure, regulatory obligations, and counsel guidance, and you should consult a qualified professional for advice on your situation. You may copy and adapt it for use within your own organization.

1. Decide before you build

- ☐ Named owner for the NDA process and the template
- ☐ Current NDA volume and turnaround measured, so you have a starting point
- ☐ Approved templates chosen, usually one mutual and one one-way, and approved by counsel
- ☐ Written positions and fallbacks for the points that are often negotiated
- ☐ Signature authority confirmed: who may sign for each legal entity
- ☐ One entry point agreed, so that NDAs stop arriving by email

2. Build the request form

Ask only for answers that change what happens next.

Field	Example	What it decides
Legal entity	US parent or a named subsidiary	Which template and which signer
Other party and contact	Picked from the CRM or supplier list	Where it is sent; avoids duplicates
NDA type	Mutual or one-way	Which template
Whose paper	Ours or the other party	Self-service or review
Purpose	Sales discussion, supplier evaluation	Whether the purpose is standard
Any exception	Changed wording, sensitive transaction	Sends the request to a reviewer

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RUN THE PROCESS

Set the rules

3. Define what can be self-service

An NDA usually qualifies when every answer below is yes. Agree on the list with counsel, and widen it as confidence grows.

- ☐ It uses an approved company template
- ☐ It stays within the pre-approved options
- ☐ The business purpose is on the standard list
- ☐ The other party is not on a restricted or sensitive list
- ☐ The requester understands what the NDA covers

4. Route the exceptions

Give every trigger a named reviewer and a target response time.

Trigger	Goes to	Target response
The other side's paper	Contracts team	2 business days
Changed template language	Assigned attorney	2 business days
Sensitive transaction, such as a deal or heavy IP	Senior counsel	1 business day

5. Sign, store, and measure

- ☐ Approved NDAs go out for signature automatically
- ☐ Signed copies file themselves in the contract repository
- ☐ Term and end dates are captured for follow-up
- ☐ Median days from complete request to signature, reported separately for self-service and reviewed NDAs
- ☐ Self-service rate, and the most common reasons requests are flagged
- ☐ Triggers and template reviewed on a regular schedule

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NEXT STEPS

Want this running sooner?

A practitioner can speed this up and bring common industry best practices to your template, form, and routing rules. Almost all contract lifecycle management, document management, and workflow tools can support NDA automation, and Swiftwater has helped clients automate NDAs and set up self-service using Docusign, Onit, NetDocuments, and other market tools.

Our professionals have run contract operations in-house, so the process gets designed around how your people work.

> TALK TO US
> **Contract management services:** swiftwaterco.com/solutions/contract-management/
> **Talk to a practitioner:** swiftwaterco.com/contact/

Keep reading

- How to automate NDAs: the full guide with screens
- Confidentiality agreement vs NDA
- Contract request and intake
- Clause libraries, contract templates, and contract playbooks
- Contract management KPIs

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