CLM requirements: before the demo

Fill in the three numbers first. Then mark each line T (threshold), I (important) or N (nice to have).

Data protection and exit are threshold requirements. Everything else depends on your numbers.

Contracts a year	Contracts the business could create itself	Active contracts to track
Split across your five most common types	From a template, if one existed	With a renewal or notice period

Contract workflow

- ☐ Can we build our approval matrix without your consultants? T I N
- ☐ Can the business create the contract types we designate from templates, without a lawyer? T I N

Templates and playbook

- ☐ Does the tool apply our playbook when reviewing the counterparty's paper, as well as when creating our own? T I N
- ☐ Is there version control and a named owner for each template? T I N

Signing

- ☐ Which identification methods are supported, including BankID? T I N
- ☐ Does the signing evidence come with us if we leave the system? T I N

Archive and search

- ☐ How do existing contracts get in, in what format, and who creates the metadata? T I N
- ☐ Do renewal and notice reminders go to the contract owner as well as the lawyer? T I N

AI functions

- ☐ Which model is used, who owns it, where does it run, and are our contracts used to train it? T I N
- ☐ Can we opt out of the AI functions, and what does that do to the price? T I N

Integrations

- ☐ Which integrations exist as standard, and what does maintaining them through updates cost? T I N
- ☐ May we read the API documentation before signing? T I N

Data protection and security THRESHOLD

- ☐ Provide the data processing agreement and the list of sub-processors. **T** I N
- ☐ Where is data stored and processed, and which third-country transfers occur? **T** I N

Exit THRESHOLD

- ☐ Can we export all contracts and all metadata in an open format, at any time, at no extra cost? Show it in the demo. **T** I N
- ☐ How is our data deleted after termination, and how is that confirmed? **T** I N

Price

- ☐ Give a price per year for three years, in writing, before the pilot starts. T I N
- ☐ What costs extra: AI, signing, storage, integrations, support, implementation? T I N