

Sales Contracting Checklist

Any company or individual exploring options to modernize sales contracting should consider certain criteria. While many departments can use contracting technology, this checklist focuses on sales specifically. It will help you decide if contracting technology is right for your company, if modernizing sales contracting should be prioritized over other business processes, if now is the right time to implement and which parts of the underlying contracting process should be addressed.

Does modern contracting fit your company goals and sales strategy?

Companies should understand how contracting software will impact their company and departmental initiatives because this connection provides the foundation for long-term success of any implementation.

The more checks, the greater alignment between contracting technology and corporate or departmental objectives. Considering the sales process – growth, experience, productivity and innovation goals will all be advanced with modern contract lifecycle management. Get more detail [in this blog](#).

Make the case to prioritize sales contracting

If contracting broadly aligns with company priorities, you must make the case for sales contracting to be prioritized over other business processes like hiring or vendor management among others. Build your case by looking at several factors:

- **Pain:** The pain caused by manual contracting
- **Impact:** The impact of automation quantified by success metrics
- **Speed:** The speed at which a solution could be implemented

Sales often rises to the top because of the volume of contracts and the direct impact on revenue. Intuition generally serves as a good first pass that can be supplemented with a detailed value assessment to quantify your business case. Get more detail [in this blog](#).

When is the right time?

It is also important to implement at the right time for your company. Contracting technology should be a priority when need, impact and company situation dictate it.

More than 2 checks means that contracting tools should be a near-term priority based on the need and impact it can have on sales. Get more detail [in this blog](#).



Which parts of sales contracting are inefficient and painful?

To understand which solutions might improve your situation, it's important to look at the stages of the sales contracting process and identify where you would most benefit from automation.

Indicate the level of pain and need for automation associated with each of these stages using a 1-10 scale, with 1 meaning the step is highly efficient and streamlined and 10 meaning there is considerable pain, inefficiency and manual work that needs to be improved immediately. The higher the pain level, the more impact modern technology can have on your business. Consider researching solutions for stages with a pain score above 5. Get more detail [in this blog](#).

Contracting process stage	Stage details	Pain level (1-10)	Software to consider
Generate	Creation of quotes and contracts customized for a specific customer. When data is entered or formatted manually, the pain level will be higher.		CLM (generation)
Negotiate & redline	Legal review and negotiation of sales contracts can create bottlenecks when done via email and Word.		CLM (negotiation) Analytics (AI review)
Approval workflows	Any nonstandard part of a contract will often require approval at one or more level. Email and spreadsheets make the process difficult and opaque.		eSignature (approvals)
Sign & execute	All parties signing the contract in required order is a big hassle when mailing, emailing and faxing.		eSignature (sign)
Manage obligations	Post-sale fulfillment to meet obligations includes many different actions like activating a service, notifications, initiating billing and more. If these workflows are done manually, there can be big delays and real pain.		CLM (workflows)
Storage	Storing contracts all over the place makes analysis, security and access very difficult even when stored digitally.		CLM (repository)
Analysis	Contracts are data that should be analyzed to identify risks and opportunities. If this is not done, there is opportunity.		Analytics (AI reports)

Additional considerations during technology research and evaluation

Before engaging with any solution provider to explore specific options further, it's also helpful to consider more tactical aspects of implementation.

- **Integration:** How strong are integrations with other critical systems (e.g. Salesforce, MS Office, etc.)?
- **Scale:** Will the software be able to grow with you and meet your needs in 3 years? 5 years?
- **Innovation:** What does the product roadmap look like? Will you benefit from future innovation?
- **Interconnectivity:** How can other departments and the business as a whole benefit and spread costs?
- **Implementation:** What resources need to be allocated and is there access to vendor/partner services to reduce time to value? What can maximize adoption and use?

If contract lifecycle solutions may make sense for your company now, the DocuSign Agreement Cloud could help you achieve your business objectives. Reach out to learn more or [set up a demo](#).