CLM PLATFORM MANAGEMENT

Pain Relief for Legal Operations

CLM platforms represent a significant investment for an organization

Key outcomes targeted are:
- Digital transformation of contract processes
- Unlocking the value of contract data
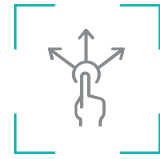- Improved transactional risk management

Many organizations fail to get a full return on their CLM investment, due to lack of adequate support following implementation

Integreon has the solution

The CLM You Wanted

Integreon Can Help!

Unlock the value of contract lifecycle management across your organization

Integreon CLM Platform Management is designed to help you get a full return on the value of your CLM investment, while freeing up in-house legal and operational staff to focus on the work of highest value

Tell Us Where it Hurts

Pain Relief for the Admin

Pain ·························· › Relief

Pain

In-house teams burdened with CLM process admin activities, such as:

- Template / clause management - making sure they are accurate, updated and available
- Workload assignment to resolve bottlenecks
- Signature and approval routing
- Contract request process management

Legal teams burdened with low-risk and repetitive tasks, such as:

- Contract template creation
- Reviewing and hunting for relevant contract information
- Tracking contract expiration / renewals and obligations

Relief

- Workflow and content design & maintenance:
  - Process Consulting & Design
  - Solution Design
  - Process Baselining / Mapping
  - Template and data harmonization

- Clause library and template optimization and maintenance to:
  - Accelerate contract drafting and review
  - Empower business units by embedding knowledge
  - Enable legal to focus on higher value, higher risk work

- Contract request management, ensuring completeness, accuracy, and comprehensiveness of the information.

- Contract assignment based on complexity or defined business rules

- Operations support for legal and business stakeholders, including approval or signature routing and triggering relevant notifications

- User Acceptance Testing

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Pain Relief for Data Management

Pain · › Relief

No access to informed decision-making, because:

- Contracts are not digitized
- Contracts are stored in multiple, disconnected systems
- Key contract terms and attributes are not tracked or extracted, exposing the business on obligations, expirations etc.
- Account status and activities are not up to date
- System data are inconsistent or incomplete
- There are no clearly defined Key Performance Indicators
- Reports and dashboards are not designed to deliver comprehensive, intuitive insights

- Repository management ensures up-to-date and centralized storage, including:
  - Contract review, ingestion, abstraction, and migration
  - Data hygiene, consolidation, and updates
  - Duplicate checking, folder creation, and parent-child relationship management to ensure family linkage

- Process health metric definition to increase operational visibility across the contracts function (e.g. cycle times) identifying opportunities for improvement

- Tailored reports & visualizations aligned to your organization's goals

- Ongoing data management recommendations and best practice insights

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Pain Relief for Poor System Adoption

Pain · › Relief

Organizations are struggling with system adoption and change management, because:

- There is a lack of visibility and useful data around system usage, user satisfaction, productivity levels etc.
- There is insufficient training and / or knowledge management
- End users do not buy into the value of the platform
- There is insufficient process and / or functional support

Process and functional management improves user adoption and supports change management, by:

- Providing and managing up-to-date training modules and guides for all user groups

- Tracking knowledge distribution and introducing timely adjustments

- Answering questions and guiding global users on how and why to make the most of the CLM platform

- Troubleshooting identified issues related to the contracting process

- Handling the intake and triage of user issues, assisting with ticket resolution, and reporting system bugs

- Augmenting the support knowledge base and process resolution documentation

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OUR BUNDLES

CLM Platform Management

CLM Platform Management—Core Features

Managed Service

Extending your team for continuous support and specific projects with experienced SMEs

Deployment & Monitoring

Clause library and template optimization maintenance; process admin support, including:
- Request management
- Contracts assignment

Analytics & Reporting

Tailored reports and visualizations aligned to your organization's goals

Repository Support

contract review, ingestion, triage, abstraction, and migration

Help Desk

Tailored training packages
- Live and self-paced, role-specific training
- Process and functional support

Onshore and Offshore

Delivery hubs to meet location, language and budget requirements

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Basic Bundle

Onshore: $22,554

Offshore: $5,343

Mixed: $7,894 (PM Onshore)

210 hours per month

Project managers & CLM administrators

Onshore / offshore managed service

Deployment & monitoring

Analytics & reporting

Repository support

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Mid Bundle

Onshore: $52,083

Offshore: $13,442

Mixed: $18,543 (PM-Onshore)

480 hours per month

Helpdesk

Solution architects, Configuration Engineers

Project managers & CLM administrators

Analytics & reporting

Onshore / offshore managed service

Repository support

Deployment & monitoring

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Enterprise Bundle

Onshore: $ 87,542

Offshore: $24,357

Mixed: $34,560 (PM-Onshore)

800 hours per month

Process engineers (Six Sigma black belts), change management consultants

Solution architects, project managers, CLM administrators & Configuration Engineers

Helpdesk

Analytics & reporting

Onshore / offshore managed service

Repository support

Deployment & monitoring

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Our SMEs

Project Manager

BUNDLE: All

RESPONSIBILITIES

- Support the planning and deployment of CLM platform management projects, including effort estimations, team members assignment, project plans, relevant communications to stakeholders, scoping, gathering requirements and procedures, etc.
- Support workshops to capture customer-specific requirements for CLM platform management support
- Communicate with internal and external stakeholders about project progress as well as risks, issues, and mitigation plans
- Manage the deployment of CLM platform management process improvements
- Track and report on performance data such as turnaround time, volumes, quality checks, and KPIs/SLAs

CLM Administrator

BUNDLE: All

RESPONSIBILITIES

- Support on User Acceptance Testing planning and execution
- Support the creation and execution of tailored training packages and FAQ and User Manuals
- Managed ongoing use of the software, providing operational and functional support to end-users

Solution Architect

BUNDLE: Mid & Enterprise

RESPONSIBILITIES

- Conduct Design workshops to capture customer-specific requirements for CLM platform management support
- Provide clear guidance and recommendations to clients on CLM platform management solutions
- Recommend refining CLM platform design to meet any specific contracting needs based on best practices and industry trends
- Support the design and creation of clause libraries
- Support on User Acceptance Testing planning and execution
- Support the creation and execution of tailored training packages and FAQ and User Manuals

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Our SMEs

Configuration Engineer

BUNDLE: Mid & Enterprise

RESPONSIBILITIES
- Support on User Acceptance Testing planning and execution
- Support the creation and execution of tailored training packages and FAQ and User Manuals
- Managed ongoing use of the software, providing support to end-users including integrations, user and data Import, feature enhancements/rollouts, troubleshooting user's profile attributes/permissions, block processes, integration issues, etc.

Change Management Consultant

BUNDLE: Enterprise

RESPONSIBILITIES
- Provide clear guidance, recommendations, and support to clients on Change Management and system adoption

Process Engineer

BUNDLE: Enterprise

RESPONSIBILITIES
- Develop stream-lined To-Be processes, addressing customer's As-Is pain points
- Document detailed To-Be process workflow of contracting processes overlaying the designed solution for the new CLM platform management support
- Conduct health checks of people, processes, and technology to conduct a Process Improvement

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Option 2-Build Your Own

Hours	Location	Term	Specials Service + Capability		
210/ Month Add to bundle	**Onshore** Add to bundle	**6 Months** Add to bundle	**Process & Content Design** Add to bundle	**Tailored Reports** Add to bundle	**Tailored Training Packages** Add to bundle
480h/ Month Add to bundle	**Offshore** Add to bundle	**1 Year -10%** Add to bundle	**User Acceptance Testing** Add to bundle	**FAQ & User Manuals** Add to bundle	
800h/ Month Add to bundle	**Both** Add to bundle	**2 Years -15%** Add to bundle	**Library Maintenance** Add to bundle	**Bug Report** Add to bundle	
Standard Services	**Process Admin Support**	**Analytics & Reporting**	**Repository Support**	**Help Desk**	

MY BUNDLE

Hours	$XXX
Location	$XXX
Term	$XXX
Special Service + Capability	$XXX
Total:	**$XXX**