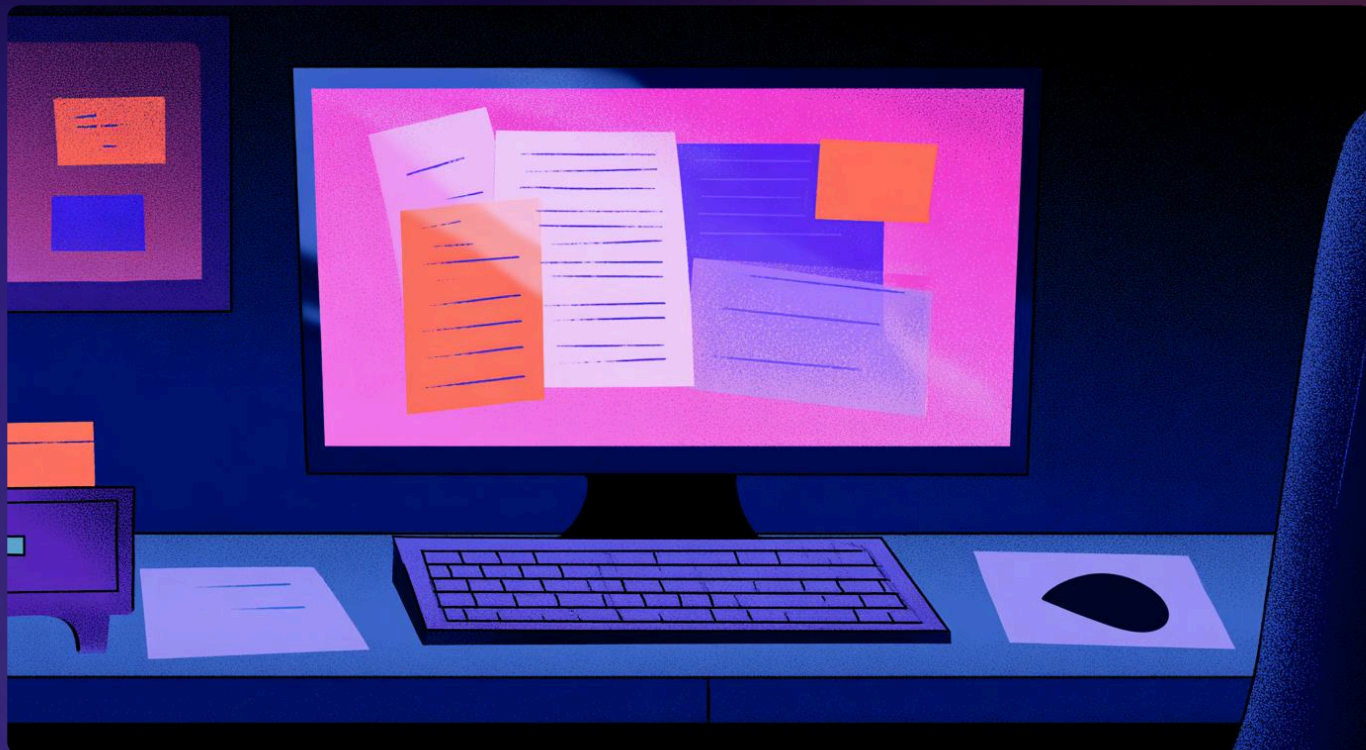


The 10-Step CLM Implementation Roadmap: Lessons From Real Rollouts



Table of Contents

03	Introduction
04	Define success before you evaluate vendors
04	Audit the contracts you actually have
05	Design the future workflow before you automate the current one
06	Build the implementation team before configuration starts
07	Standardize your data before you migrate it
08	Decide whether to phase the rollout
08	Configure for the common case (not every case)
09	Treat migration as a validation exercise
10	Train people according to the work they perform
10	Measure success in phases
12	Great implementations are defined by sequence



Most contract lifecycle management (CLM) implementation guides make the same mistake: they treat the process as a checklist. Complete all the steps and everything will go smoothly.

In practice, the challenge isn't knowing what to do. The difference between a smooth rollout and a stalled one comes down to when those activities happen. Implementation isn't a punchlist. It's a flowchart.

We've seen the same pattern across implementations of every size. Teams spend weeks debating rollout strategy before they've mapped a single workflow. They migrate decades of contracts without agreeing on metadata standards first. They automate approval chains that nobody actually likes, then wonder why employees keep sending Word documents over email instead of through the CLM after launch.

The sequence matters.

**Below is a proven
step-by-step CLM
implementation
roadmap that reflects
lessons from real CLM
deployments across
legal, procurement,
sales, and finance.**

01.

Define success before you evaluate vendors

Most buying committees begin with feature comparisons when they should instead focus on business outcomes.

Legal often measures success in reduced risk, standardized language, and stronger compliance. Sales wants contracts moving faster. Finance wants renewal visibility and cleaner forecasting. Procurement wants better supplier governance.

Those priorities all belong in the project, but they are rarely defined in advance, including how they'll be measured. As a result, CLM implementation becomes a negotiation over competing feature and process requirements. Approval workflows change halfway through the project. Reporting requirements appear after dashboards have already been built. Teams revisit decisions they thought were settled months earlier.

Agree on measurable outcomes before anyone evaluates software. Cycle time, renewal capture, contract visibility, approval turnaround, and risk reduction provide a far stronger foundation than an arbitrary launch date.

Accession established those metrics before implementation began. That discipline helped the organization achieve a reported [\\$1.4 million ROI while reducing contracting time by 96%](#).

02.

Audit the contracts you actually have

Every organization believes it knows where its contracts live. Almost every organization is wrong.

Shared drives turn into personal folders. Executed agreements sit in email inboxes, CRMs or ERPs. Procurement stores one version while legal stores another. Amendments exist without the original agreement. Metadata varies depending on who uploaded the file.

The audit almost always uncovers more documents than expected, and more inconsistencies than anyone anticipated. That's why this phase routinely takes longer than project plans suggest.

CBORD, a food packaging company with a three-attorney legal team, spent significant effort untangling contracts spread across a complex organization before centralization could begin. The effort paid off, allowing CBORD to [normalize thousands of contracts that dated back more than 50 years](#).

A repository only becomes valuable when people trust that it contains the complete picture.

03. Design the future workflow before you automate the current one

This is where many implementations go sideways: Teams document today's (suboptimal) approval process, then recreate it inside the new platform. That approach preserves every bottleneck, duplicate review, and unnecessary approval that frustrated users in the first place.

Current-state mapping and future-state design are different exercises.

First, understand how contracts move today. Then ask whether every review, approval, and handoff still serves a purpose. Eliminate unnecessary work before automation enters the conversation.

Manscaped approached implementation as an opportunity to improve collaboration across departments, not simply replace email with software. The project focused on aligning teams around a better process before configuring workflows inside the platform. The result was [significantly faster and more effective contract processes](#).

Technology should reinforce the process you want to run next year, not the one you've outgrown.

REQ-1146: Approve latest version

No due date • Document Task • Assignee(s): Mike Fogarty

Approve ▾



✓ Request created successfully: REQ-1145

Success! The Mutual NDA has been generated and the workflow is now underway!

NDA Submitted — Workflow Initiated

Field	Value
Document	Acme NDA
Request ID	REQ-1145
Client	Acme Corporation
Contact	John Jameson, CFO
Counterparty Email	jameson@acme.com

04. Build the implementation team before configuration starts

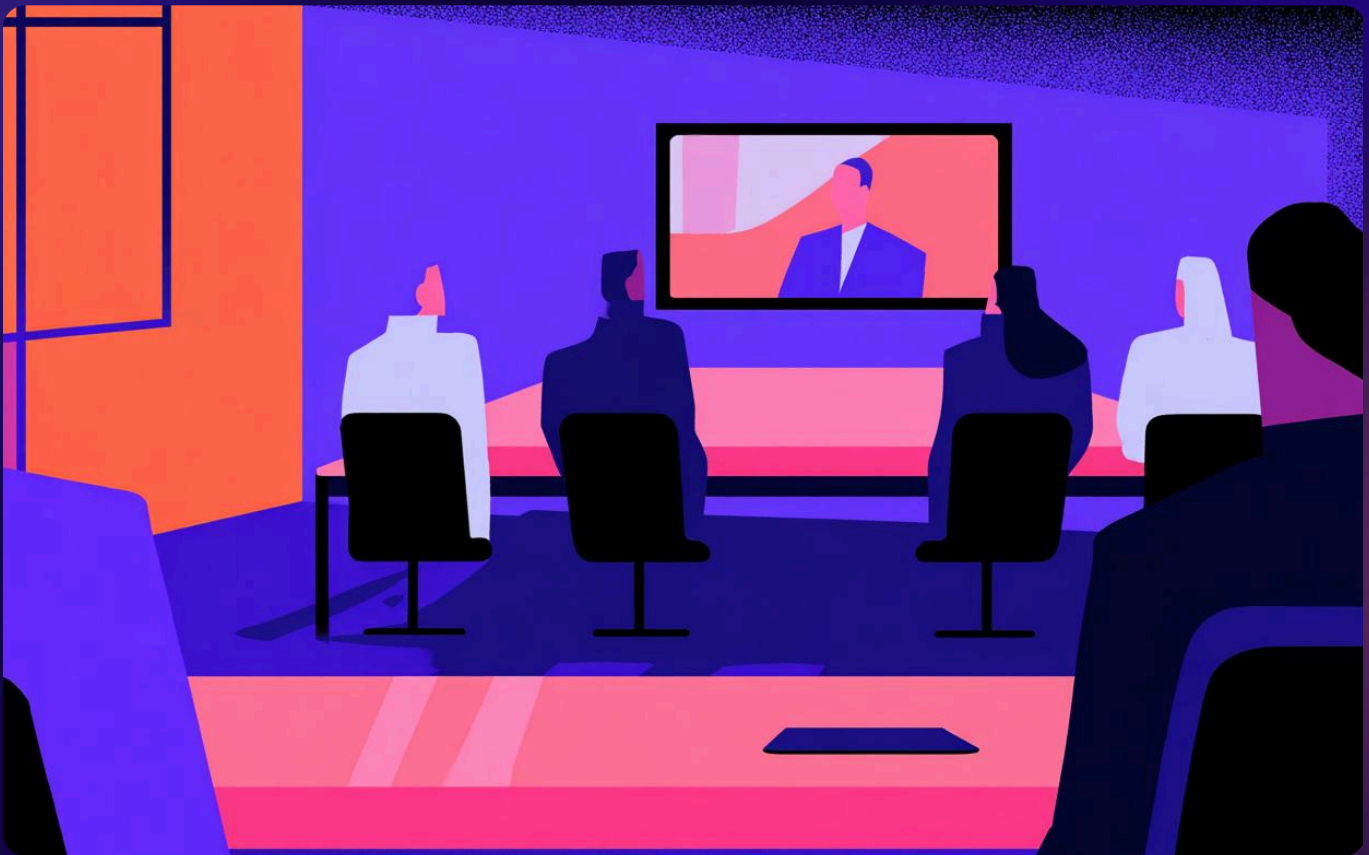
Legal usually sponsors a CLM initiative. That doesn't mean legal should make every implementation decision.

The strongest projects bring procurement, sales operations, finance, IT, security, and business stakeholders together from the beginning. Every one of those groups will eventually depend on the CLM platform. The consequences of excluding any of these stakeholders don't appear until late in the project, when reporting requirements, ERP integrations, or approval rules force expensive redesign work.

One solo general counsel avoided that trap by building broad organizational ownership instead of trying to manage implementation alone.

CCC Intelligent Solutions succeeded because procurement and legal designed processes together rather than handing work back and forth.

Cross-functional alignment feels slow early in the project. It saves months later.



05. Standardize your data before you migrate it

Every AI demo assumes clean contract data. Very few organizations have it before implementation begins. (Frankly, half the reason orgs adopt CLM is to clean up the contract chaos.)

Legacy repositories are filled with duplicate templates, outdated clause language, inconsistent customer names, incomplete metadata, missing amendments, and contracts categorized according to different standards.

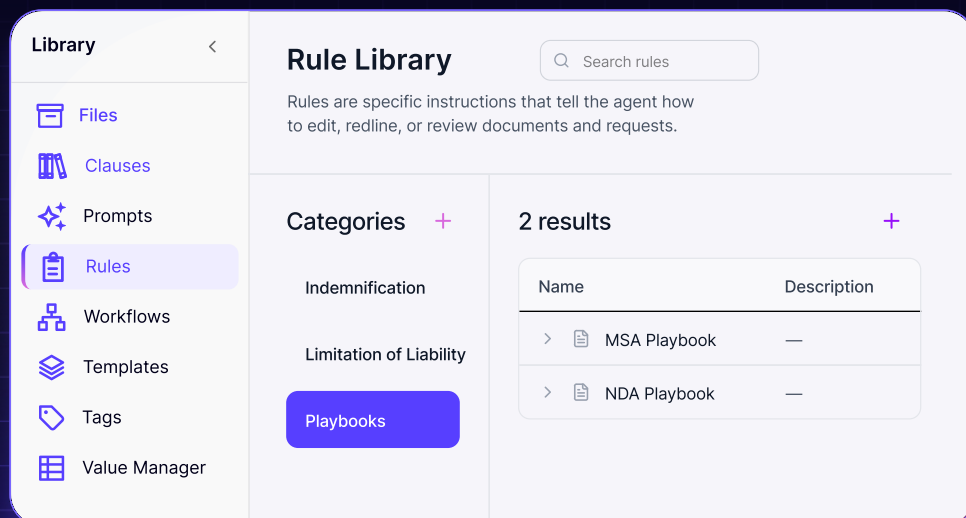
That isn't simply an organizational problem.

Until your contract data is normalized, AI extraction becomes less reliable. Search results lose precision. Reporting becomes inconsistent because the same agreement appears three different ways.

Before migration begins, consolidate templates, establish a clause library, define metadata standards, and agree on naming conventions.

EnterpriseDB completed that work prior to ingesting their repository of 4,000 contracts into their CLM. before surfacing insights across more than 4,000 contracts. Organizing the data made it possible to [wrangle and standardize a contracting process that began with 45 different intake forms, templates, and questionnaires.](#)

Garbage in still produces garbage out, even when AI is involved. Pre-AI contact cleanup pays dividends in perpetuity.



06.

Decide whether to phase the rollout

Many implementation teams ask this question too early.

They debate phased deployment versus a companywide launch before they've completed workflow design or data preparation.

That's backwards.

Rollout strategy should follow implementation readiness, not drive it.

The right approach depends on three factors: organizational complexity, contract volume, and risk tolerance. A global enterprise with multiple business units often benefits from phased deployment by geography or contract type. A company facing a hard compliance deadline may choose a broader rollout with a tightly defined scope.

OmniTRAX completed their [CLM implementation in six weeks](#) because the organization had a clear objective and avoided expanding the project midstream.

The best rollout strategy reflects operational realities, not industry trends.

07.

Configure for the common case (not every case)

Lawyers are trained to account for every conceivable risk, which often means they try to configure CLM workflows for every possible exception. The result is approval logic so complex that ordinary contracts become harder to process than unusual ones.

Focus first on the agreements your business handles every day. Configure approval routing, permissions, e-signature integrations, and access controls around those common scenarios. Create a practical path for exceptions instead of building every exception into the standard workflow.

Commvault took that approach by [integrating CLM with Salesforce, giving sales teams self-service access to routine agreements](#) without creating additional work for Legal.

Simple workflows are easier to adopt, easier to maintain, and easier to improve.

08. Treat migration as a validation exercise

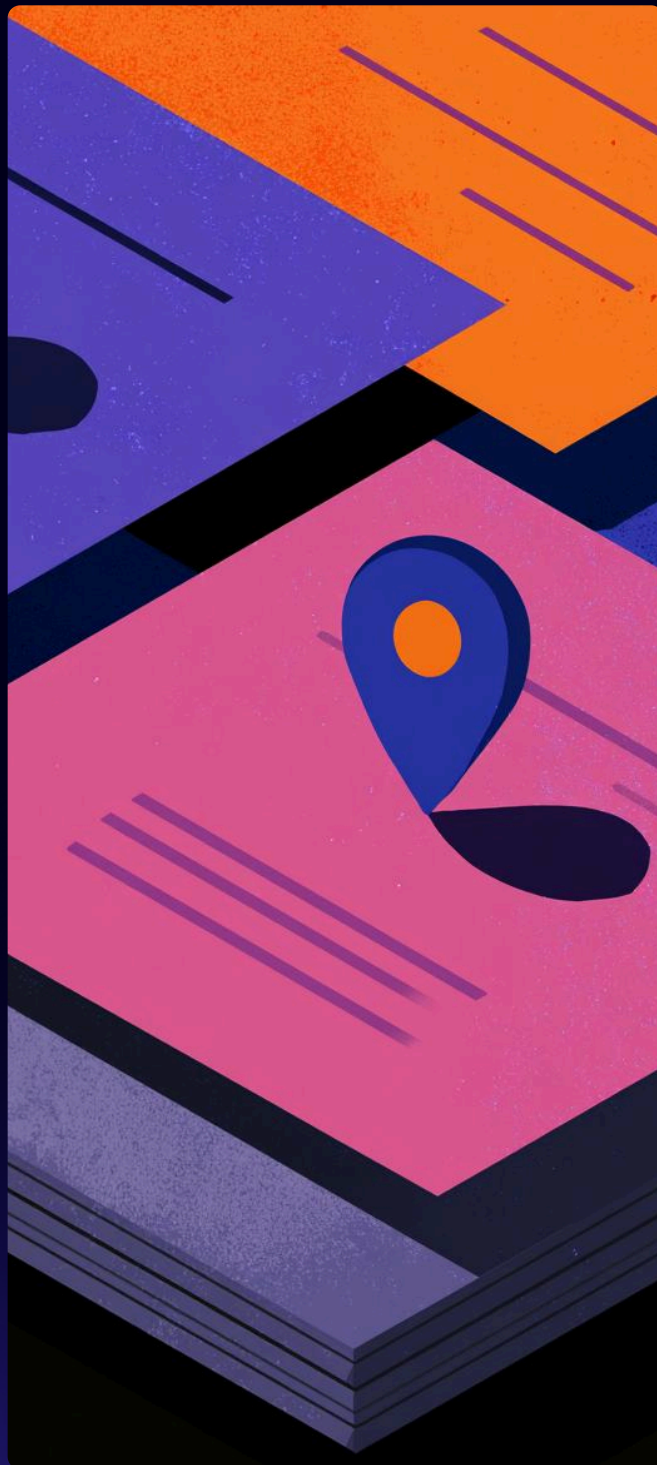
Uploading contracts isn't the finish line; creating trust is.

Most organizations combine AI extraction, OCR, and manual review during migration. Even with strong automation, expect a meaningful portion of contracts to require human validation. Poor scans, handwritten amendments, inconsistent formatting, and older agreements all introduce extraction errors.

Budget time for quality assurance from the beginning. Random sampling isn't enough when thousands of contracts are involved. High-value agreements deserve targeted review before go-live.

As noted above, **EnterpriseDB** successfully migrated and analyzed more than 4,000 contracts because validation received the same attention as migration. **CBORD** centralized decades of agreements while creating a stronger foundation for future drafting because they invested in validation.

Users lose confidence quickly when they can't trust search results. Verification creates trust.



09.

Train people according to the work they perform

One training session rarely changes behavior. A one-size-fits-all training almost never does.

Legal professionals need detailed instruction on drafting, clause libraries, negotiation workflows, and AI-assisted review. Approvers need concise guidance on reviewing requests. Occasional users need a straightforward way to request contracts and track progress.

Those audiences shouldn't receive the same training because they don't perform the same work.

When adoption stalls, organizations often blame the software. More often, they underestimated change management.

Peregrine Hospitality [increased CLM adoption by giving different stakeholder groups the training they actually needed](#), while improving visibility across every stage of the contracting process.

Successful implementations create confident users before they expect enthusiastic users. Specialized training creates that confidence.

10.

Measure success in phases

The first 90 days and the first year of using a CLM answer different questions.

After launch, focus on adoption, workflow completion, user feedback, and data quality. Those metrics reveal whether people are actually using the platform.

Longer-term measurements should shift toward business outcomes. Cycle time, renewal capture, procurement efficiency, compliance, and outside counsel spend reveal whether the implementation is changing the business.

Accession's reported [\\$1.4 million ROI and 96% reduction in contracting time came through sustained optimization, not the launch itself](#). **Vivid Seats** likewise [improved procurement performance by measuring results](#), refining workflows, and expanding adoption over time.

Organizations that expect full ROI within weeks usually end up disappointed. Organizations that treat implementation as an ongoing operational program continue finding new value years after go-live.

Great implementations are defined by sequence

Every CLM implementation includes migration, configuration, training, and change management.

What separates successful projects is the order.

The strongest teams resist the temptation to skip ahead.

✓ They agree on business outcomes before evaluating software.

✓ They redesign workflows before automating them

✓ They redesign workflows before automating them

✓ They clean data before migrating it, and they build organizational alignment before asking people to change the way they work.

That sequence may feel slower at first. But, as evidenced across real implementations, this sequenced approach consistently produces faster adoption, fewer surprises, and stronger business results.

If you're ready to adopt the cutting-edge CLM solution with the most experienced and proven implementation team in the business, [contact LinkSquares today.](#)

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 Hello, Legal

Draft new contract |

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