CLM Tech Success Guide in ~~5~~ 7 Easy Steps

1. **Identify the top problem to be solved**
   - ☐ Intake and workflow
   - ☐ Template creation and clause library
   - ☐ Repository, search and meta data
   - ☐ Post-signature obligations tracking

2. **Map the current and future processes. The difference between the two will dictate the change management plan: who is being affected and how?**

3. **Define roles of key stakeholder groups**
   - ☐ Who makes decisions
   - ☐ Who provided input
   - ☐ Who needs to be informed
   - ☐ Who will be power users

4. **Pick a small number of templates or contract types to start with**
   - ☐ Sales-side only
   - ☐ Buy-side only
   - ☐ One of each
   - ☐ NDAs

5. **Do the research on available technologies**
   - ☐ Talk to peers
   - ☐ Review available literature
   - ☐ Find contacts of posted case studies customers

6. **Select three vendors for demos**
   - ☐ Ask for as many demos as you need
   - ☐ Guide the vendor by having specific goals for each demo
   - ☐ Invite stakeholders, but keep everyone focused
   - ☐ Be crisp on top priorities

7. **Score the demos objectively (and subjectively – focus on the people behind the tech: responsiveness, accuracy, reliability, customer success program, implementation team)**