



# Seven Onboarding “Musts” to Ensure Successful Contract Management



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After selecting a contract management software provider – and involving all the internal constituencies that would be impacted by that decision – you haven't truly crossed the finish line until the solution has been adopted by your end-user community and is being used daily to effectively manage your contracting process. One of the most crucial factors to ensuring end-user adoption is a quick, smooth, and successful onboarding process. This document will address seven "musts" required for your onboarding process to be successful.

## What is "Onboarding"?

In its simplest form, there are really 3 components to onboarding:

1. Configuring the software solution to match the way you speak and work within your organization. An example could be the types of contracts you use, such as NDA, MSA, SOW, and the critical pieces of information contained in each of these that can be translated into data fields, drop-down menus, templates, and naming conventions within the platform.
2. Migrating your existing electronic data and documents into those data fields, including linking all the appropriate documents to the appropriate contract records.
3. Teaching your end-user community how to navigate the software; accessing, editing, and adding to the data and documents that have been migrated into the solution, and performing the functions required to manage their part of the contracting process.



## Seven Onboarding “Musts”

### 1 Onboarding MUST start with a plan, before ever touching the software.

Automating your contract management process is an exercise in dissecting your existing contracts into their component parts, thinking through the steps required to shepherd your contracts through your various contracting activities, and enabling your end-user community to have access to the data and functions they need to perform their jobs. So, your onboarding process must start with a plan, to be designed offline, and then translated online into the software.

Contract types, organization types, contact types, and document types – and their associated fields, drop-down values, data types, layouts, and requirements need to be defined. Roles within your organization, the access each of those roles has to each contract type, and the individual users assigned to each of those roles must be defined. Multiple other factors also need to be considered, defined, and added to the blueprint you create for your eventual automated solution.

Seek a solution whose planning process is worksheet and checklist driven, that prompts you for decisions to be made and information to be documented in a specific order that corresponds to how your eventual solution will be configured, and how your data and documents will be imported into the solution. The process should solicit input from all your internal subject matter experts and representatives from all the functional areas that touch contracts and require sign-off on the final plan from these constituencies. This way, when the software provider and your internal system administrator sit down with the actual software to begin the onboarding process, your blueprint maps directly to each administrative area within the product, and provides approved, clear, easy-to-follow instructions for each step required to launch the solution within your organization.

### 2 Onboarding MUST happen quickly.

There is nothing worse than losing the momentum that has been built within your organization during the selection process by taking months to implement the solution. While your vendor of choice works with your IT department and perhaps the internal champions of the project, your end-users continue to utilize their existing, sub-optimal processes. The longer they wait for the solution to launch, the more they begin to doubt its eventual viability, and the less invested they will be in learning and using it.

Seek a solution that can be onboarded in hours and days, rather than weeks and months. A key to this is ensuring that the solution has a very intuitive, user-friendly interface for the person who is selected as your internal administrator of the platform to use, and that the solution provider is committed to teaching your administrator to be self-sufficient. The more you can rely on your own administrative resource, who understands your business better than any vendor, to perform the onboarding process in a hands-on fashion, the quicker this process can be completed. You do not want the speed with which you get to your launch date to be gated by the vendor’s availability – or lack thereof – at every step of your onboarding process.

### 3 **Onboarding MUST deliver a solution that mimics the way your organization does business.**

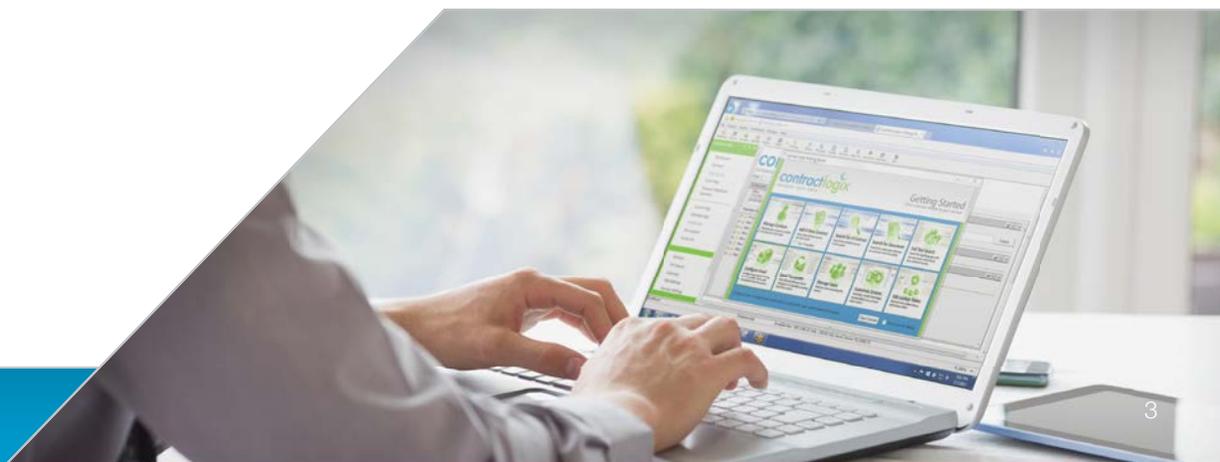
The way this evidences itself within a contract management solution is to ensure that all the unique contract types used at your organization – be it 3, 30, or 300 – appear as contract types within the solution, and that all the unique combination of data fields that comprise each contract type are included. The names that your organization uses for certain pieces of information are the names that are assigned to those fields, and in instances where there are a finite number of options for each of those pieces of information, those options appear in the drop-down menus for those fields.

Seek a solution that not only has the flexibility to map the way you work and speak at your organization to what you see in the software's interface, but makes it very easy for your internal administrator to add contract types, fields, drop-down menu values, and templates as your business changes and evolves. Better yet, seek a solution that will allow you to upload a spreadsheet that contains all the names of all the fields that you'd like contained in all your contract record types, and all the data that you'd like to appear in those fields – including drop-down menu values – that will automatically create each contract record type for you, and create all the records for that contract type. Imagine the sense of comfort and confidence among your end-users when – just days after selecting the solution – they see that it not only reflects the way they work, but that it already contains all their data. Rapid end-user adoption and velocity to realizing value (ROI) is sure to follow.

### 4 **Onboarding MUST address documents that are associated with the contract record.**

Though the contract record itself contains all the “meta-data” associated with the contract, meaning all the pertinent information that define the contract's terms that can be categorized into field-level data, you will undoubtedly want to append supporting documents to the contract record. These documents could include a PDF of the actual contract itself, spreadsheets containing figures associated with the agreement, presentations given during the pitching process, letters exchanged during the selling and negotiation process, etc.

Seek a solution that makes it just as easy for these documents to be brought into the platform and be accurately attached to the contract records to which they belong, as it is to onboard the contract record data itself. Your internal administrator should be able to easily use the solution to perform this for 10 documents or 10,000 documents, based on your company's needs. Better yet, ensure that the solution you select will immediately scan and index the contents of any PDF or Microsoft Office document right when it is imported, so that those contents can be found when performing a search within the platform. Otherwise, it can be like searching for a needle in a haystack to find that one supporting document that contains the word “unicorn” – just as it was when it was somewhere on one of a dozen people's hard drives before you centralized and automated your contracting.



## 5 Onboarding MUST easily apply role-based security.

Another wrench that gets thrown into the works of end-user adoption is when users who need access to certain data or contract types can't access that information; or vice versa - users who are not supposed to have access to certain sensitive information do in fact have access. This is especially true of individuals who feel a real ownership for a specific contract type, or specific pieces of information within those contract types. Getting off on the wrong foot with these important stakeholders can be tough to overcome.

Seek a solution where the internal administrator is empowered with an extremely easy-to-understand, and easy-to-use interface for assigning roles to individuals, and then granting view, add, edit, and delete access to those roles. In fact, it should be so user-friendly that the administrator should be able to literally sit down next to those stakeholders responsible for defining various levels of access and walk through the process together, with the stakeholder being able to immediately understand how the solution is translating his/her requirements into role-based security rules. These are often key project champions who represent their respective end-user constituencies, and making them happy, by ensuring that all the requirements are met, will significantly help facilitate adoption of the solution.

## 6 Onboarding MUST enable your organization's self-sufficiency.

As evidenced by all the items above, the more your internal administrator and your end-users understand how to use and modify your solution as your organization grows, and its contracting needs grow, the more self-sufficient it will be. Gone should be the days when you must buy blocks of hours from a vendor and be fit into their busy schedule to make modifications to screens; import new data; or add new users, roles, templates, or security. Your organization should be as self-sufficient at using your contract management solution as it is at using your word processing software, spreadsheet software, or presentation software.

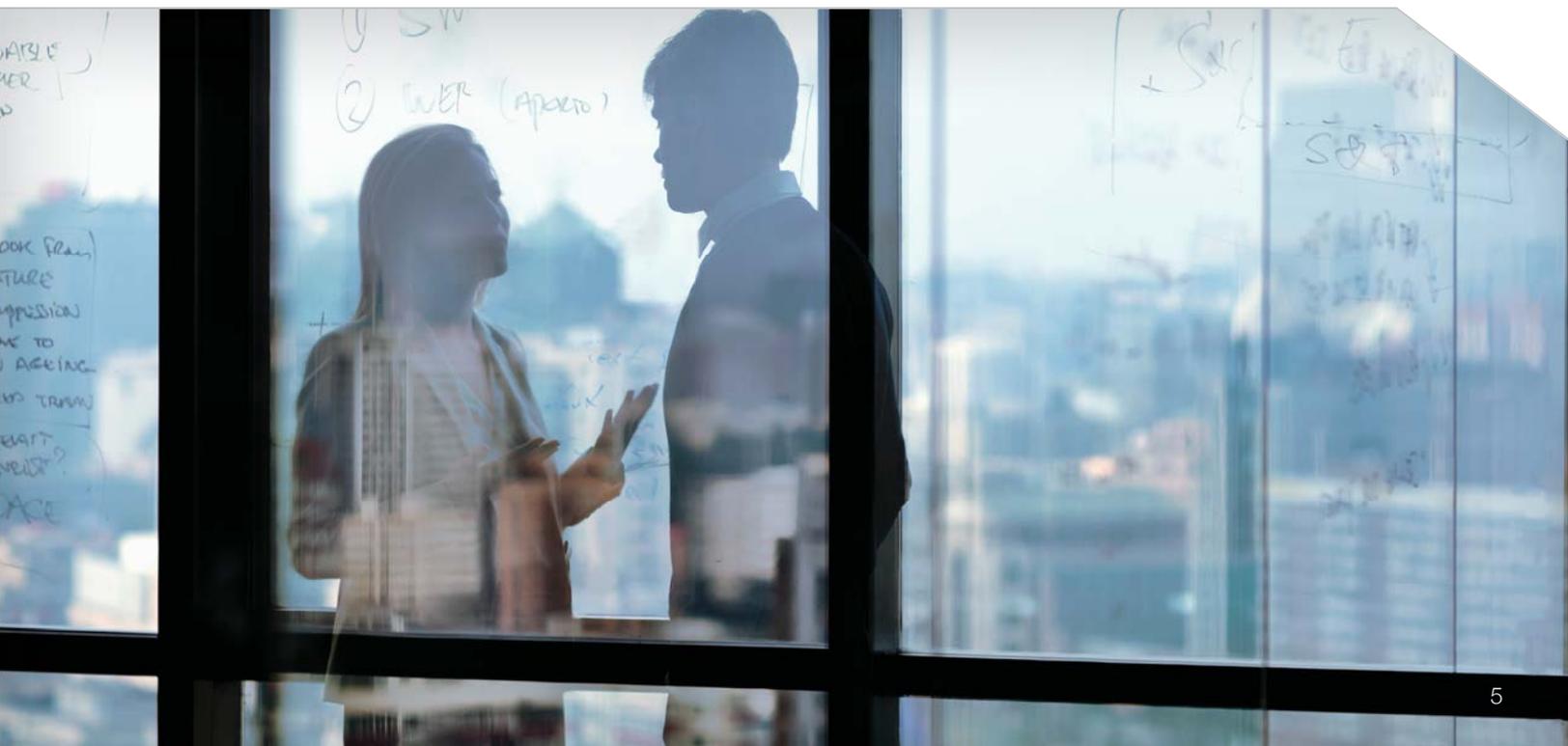
Seek a solution that can demonstrate to you during your due diligence process how easy administration and use of the product is. Ask them to show you how to add a contract type, a field, a user, a role, etc. Compare that process to other vendors and imagine how much more self-sufficient you will be with a solution that is easy to onboard and maintain. Ensure that the solution provider has end-user support included in their price, as well as free access to video training, and if they say it takes more than hours or days to onboard, consider another solution.

## 7 Onboarding **MUST** enable self-teaching within your organization.

Finally, as your internal administrator is onboarding your solution, he/she is gaining an intimate knowledge of all your contract types, fields, documents, users, templates, roles, security access, etc. Through this process your administrator will gain a complete understanding of how the solution looks and how your end-users will use it. This puts the administrator in a position to turn to the constituencies who defined the requirements that he/she translated into the solution and show them how to use it. This enables training to be performed on a schedule that is convenient for the administrator and his/her colleagues, rather than that of the vendor, and it enables the training to be performed by someone who understands the business – and the genesis of its requirements – better than the vendor ever could.

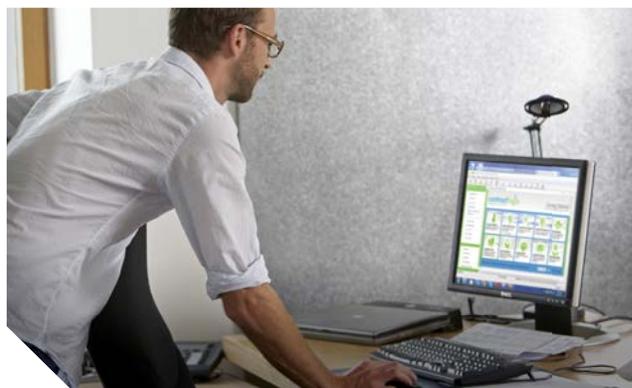
Seek a solution – as referenced earlier – that provides user-friendly means by which an administrator can embrace it, configure it, and migrate data and

documents into it so that everything gained through that learning can be applied to teaching the end-user community – or key players within that community – how to use the solution. Key players can then become trainers of their individual departments or functional areas through a training-the-trainer model. These players then become an important and educated conduit through which ongoing requests of your administrator can be funneled. Also ensure that the solution provider offers free online video training so that end-users can choose to refresh their knowledge or train at their own pace absent the availability of their administrator. All these steps will enhance the training experience for end-users and get them trained more quickly, resulting in quicker adoption and quicker ROI of your contract management solution.



## About Contract Logix, LLC

Contract Logix is one of the longest tenured companies in the contract management space, with more than a decade's experience, hundreds of client companies, and thousands of end-users. Leveraging what we've learned during that time, we built our contract management solutions with ease of use and ease of adoption by everyday business users in mind. Yet the software is powerful enough to meet the sophisticated needs of even the most demanding contract management professional.



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