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EBOOK

Ultimate guide to CLM for legal teams

How legal leaders can reduce workload, accelerate contract review, and mitigate risk with trusted CLM + AI solutions

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Why CLM matters now for legal

Contracts are the foundation of modern business—regardless of industry or size. Contracts and agreements touch every aspect of a company, regulating every dollar that flows in or out, every vendor relationship, every sale, and every strategic partnership.

Because contracts are so critical, legal teams spend a lot of time and effort engaged in contract processes. In some organizations, legal plays a hands-on role in every contract—from simple NDAs to complex MSAs and everything in between.

While this strict oversight helps to ensure compliant contracts, it also creates bottlenecks and stretches legal teams to their limit.

The result:

- Slow turnaround times
- Delayed revenue
- Increased risk of missed obligations
- Underutilized legal expertise
- Frustrated customers, vendors, and partners

When contracts slip through the cracks, it's not just operational inefficiency—it's potential exposure that keeps general counsel up at night. Boards expect legal to enable growth, not slow it down, and that pressure is rising as deal velocity accelerates.

The problem with repositories—and how CLM can help

In response to the growing challenge of contract management, legal teams often attempt to centralize contracts in a shared repository. But storage alone can't solve the problem. An electronic contract in a digital folder is still a static document—difficult to search, track, or act on without context or visibility.



Repository vs. CLM: why storage alone isn't enough

Repository	CLM
Static storage	Dynamic management
Manual search	Intelligent search & insights
Siloed access	Cross-functional visibility
Missed renewals	Automated alerts
Hidden risk	Real-time tracking & reporting

Contract lifecycle management (CLM) technology is designed to help legal teams break free from manual, reactive contract processes. When implemented effectively, CLM can reduce friction, improve compliance, and accelerate business outcomes.

With automated workflows, intelligent insights, and cross-functional collaboration built in, CLM technology streamlines contract processes from start to finish—empowering legal teams to shift from manual gatekeepers to strategic partners.

In this guide, we'll explore how legal teams can leverage CLM to alleviate pressure and unlock greater efficiency across their organization.

5 signs you've outgrown a repository

1. You can't find contracts quickly

Searching is slow and manual. Searches are based on filenames rather than key terms and clauses.

2. Legal touches every contract

Even simple NDAs and vendor agreements require legal review.

3. Renewals and terminations slip through the cracks

Without alerts and automation, deadlines may be missed—increasing costs and revenue leakage.

4. No cross-functional visibility

Teams like sales, finance, and procurement can't see the same version of a contract—or check its status—without contacting legal.

5. Risk exposure is hidden

You don't know what obligations, liabilities, or non-standard terms exist until it's too late.

Understanding CLM and how it works

CLM software brings order, efficiency, and visibility to the complex task of contract management. At its core, CLM is designed to streamline every stage of the contract lifecycle—from initial request and drafting to negotiation, approval, execution, obligation management, and renewal.

Modern CLM isn't about replacing lawyers – it's about giving them better control, context, and visibility across every agreement. Legal still owns the decisions; CLM just reduces the friction that slows them down.

Automating routine contracts gives the legal team more time to focus on strategic, value-added initiatives. CLM also offers a centralized system of record that replaces static documents and manual tracking with intelligent, automated workflows.

CLM technology has evolved dramatically in recent years. Today's modern CLM solutions provide powerful enterprise capabilities, including end-to-end contract management, obligation and compliance tracking, and integrated collaboration tools.

Advanced CLM solutions are powered by artificial intelligence (AI) that can identify risk, recommend language, and uncover insights buried deep within your contract data.

In short, CLM has become a must-have for busy legal teams under constant pressure to do more with less.

Why? Modern, AI-powered CLM can:

- **Bring** structure to slow, manual, and inefficient contracting processes
- **Streamline** contract creation with preapproved templates and clause libraries
- **Create** contracting “guardrails” that reduce risk exposure
- **Automate** review and approval workflows to eliminate delays
- **Track** the status of every contract in real time
- **Prioritize** high-risk and high-value contracts for deeper review
- **Answer** complex contract questions and enable smarter legal decision-making

For legal teams navigating high contract volumes and rising complexity, CLM is about more than efficiency. It's an opportunity to take control, improve visibility, and scale legal oversight without increasing headcount.



CLM readiness checklist

Is your legal team bogged down in manual contracting processes?

Take this quick self-assessment quiz to see if you're ready to adopt an automated CLM solution.

Yes

No

Do simple NDAs take more than two business days to process?

Do lawyers review 100% of contracts, even standard templates?

Do you lack a real-time dashboard of active contracts and obligations?

Do you rely on spreadsheets or manual reminders for renewals?

Have stakeholders like sales, procurement, or finance complained about delays or lack of visibility?

Scoring key:

Count your "yes" responses to the questions above and check your score against the following key.

0-1: A repository may still meet your needs

2-3: Time to start evaluating CLM solutions

4-5: You're overdue for CLM. Risk and inefficiency could be damaging your business.

Top 10 CLM features for legal teams

There are countless CLM solutions on the market today—and modern CLM software includes a wide variety of features and functionality. When evaluating CLM software, it's important to consider your organization's unique needs and analyze how each feature will benefit your legal team, both now and in the future.

For legal, the most valuable capabilities are those that protect defensibility, ensure compliance, and restore visibility into every clause and commitment—not automation for its own sake.

To optimize the value of your CLM investment for the legal team, look for a tool with the following features:

1. Customizable workflow management

Automated routing through review, approval, and execution helps to reduce manual intervention, speed up turnaround times, increase visibility into contract status, and ensure compliance.

2. Template and clause library

Pre-approved templates and clauses ensure consistency across contracts, reducing the risk of legal exposure. Standardized language also enables self-service, reducing the time legal spends drafting repetitive documents.

3. Collaboration and redlining tools

Integrated collaboration features (like real-time redlining and commenting) streamline negotiations. Having all revisions tracked in one place helps to avoid version confusion and accelerates the review process.

4. Advanced search

Robust search capabilities—including Optical Character Recognition (OCR)—allow legal teams to locate specific clauses, dates, or terms across massive contract libraries for faster review, risk analysis, and compliance checks.

5. Obligation and renewal management

Automated alerts help legal teams proactively manage obligations and avoid missed deadlines. This minimizes business risk and ensures continuity in supplier or customer relationships.

6. Version control and audit trails

Clear version tracking and audit logs are critical for ensuring contract integrity and defensibility. Legal teams must be able to trace every change, comment, and action to maintain a secure and transparent record of negotiations and approvals.

7. Reporting and analytics

Built-in dashboards and analytics help legal teams track performance metrics like contract cycle time, status, and risk exposure. These insights can inform process improvements, resource allocation, and executive reporting.

8. AI-powered contract review and risk scoring

AI capabilities can automatically flag non-standard and risky clauses, suggest preferred language, and extract key contract data. This improves the legal team's ability to identify high-risk contracts and focus attention where it's needed most.

9. eSignature integration

A seamlessly integrated eSignature solution (like Conga Sign) provides a secure, compliant, and trackable way to sign documents and accelerate contract execution. This is especially valuable for remote teams and global businesses.

10. Integration with other systems

A CLM should integrate with other business tools used across the organization (e.g., CRM, ERP, and procurement systems) to eliminate data silos, improve accuracy, and create a single source of truth for contract-related information.

The true value of CLM

A CLM platform is more than just an operational tool—it's a strategic asset for legal teams and their business partners. By streamlining contract creation, review, negotiation, and execution, CLM can significantly reduce the legal team's manual workload while also amplifying their influence across the organization.

That influence extends beyond efficiency. When contract cycle times drop, risk exposure becomes measurable, and compliance is documented, legal earns credibility as a strategic partner to the business—not just the department of 'no.'

The value of CLM for key stakeholders

- **Sales**
 - Faster contract turnaround means deals close quicker and revenue is recognized sooner.
 - Less contract rework improves the buyer experience and enhances customer satisfaction.
- **Finance**
 - Clear visibility into contractual obligations supports compliance and better planning.
 - Improved forecasting from centralized contract data leads to more accurate revenue and cost projections.
- **Procurement**
 - Standardized vendor and supplier terms reduce negotiation cycles and ensure consistency
 - Cost control is easier with transparency into contract value, commitments, and renewals.
- **IT**
 - Seamless integrations with CRM, ERP, and other enterprise systems reduce data silos.
 - Enhanced security ensures sensitive data is protected through strict access controls.

The value of CLM for legal teams

- **Faster contract review:** AI-powered CLM systems accelerate the review process by flagging risky clauses, surfacing non-standard terms, and suggesting redlines—all in real time.
- **Reduced workload:** Self-service templates and clause libraries empower business users (like sales and procurement) to generate compliant contracts without direct legal involvement.
- **Risk mitigation:** CLM tools offer built-in tracking for obligations, compliance deadlines, and risk exposure—helping legal teams stay ahead of audits and avoid regulatory penalties.
- **Strategic influence:** With more bandwidth and better visibility, legal can help to shape business strategies, advise on negotiations, and identify opportunities for operational improvement.

In short, investing in CLM allows organizations to unlock operational efficiency and strategic value across every function.

Making CLM work in practice

Adopting CLM technology may seem like a major shift, but legal leaders can be confident of this truth: CLM implementation is not only possible, it's also practical and proven.

Today's modern CLM platforms are designed to align with the pace and complexity of real-world legal work. Legal leaders are right to be cautious – CLM projects have a reputation for falling short. The difference comes from clear ownership, realistic milestones, and a trusted partner who knows how to deliver predictable results. With proper planning and execution, legal teams can drive steady, meaningful transformation with minimal disruption.

A realistic implementation roadmap

- **Set short-term and long-term goals**

Define what success looks like at each stage of implementation. Short-term goals might include reducing NDA turnaround times by 50% or increasing self-service usage. Long-term objectives could include full integration with your CRM/ERP systems or expanding CLM to cover the entire contract portfolio. Clear targets keep the team aligned and focused.

- **Assign key roles and responsibilities**

CLM success depends on ownership. Identify who will lead legal operations, manage the technology, support end users, and oversee integrations. Assigning clear responsibilities ensures accountability, avoids bottlenecks, and keeps implementation moving forward.

- **Start small, then scale**

Begin with high-volume, low-risk agreements. NDAs, vendor contracts, and basic sales agreements provide a great testing ground for automation. As adoption grows, you can expand to more complex documents like MSAs, SOWs, and partner contracts.

Pro tip: Don't aim for perfection on Day 1

The goal is progress, not perfection. Early wins—like accelerating turnaround times or boosting self-service adoption—build internal momentum and demonstrate the value of CLM quickly.



Adoption tips to drive success

1. Executive sponsorship matters

Having your general counsel or CLO champion the rollout signals the importance of CLM to the broader organization and ensures top-down support.

2. Engage cross-functional champions

Involve stakeholders from sales ops, procurement, and finance early in the process. Their input helps tailor workflows to business needs and positions legal as a partner, not a bottleneck.

3. Demonstrate success with data

Use dashboards to track and show progress toward KPIs leaders care about, like:

- Reducing contract cycle times
- Identifying risk and compliance issues
- Increasing contracts handled YoY
- Expanding use of “touchless” or self-service contracts

4. Train using real contracts

Ditch the dummy documents. Training with the actual templates and agreements your team works with every day to accelerate learning and build confidence.

5. Gather feedback and iterate

Roll out your implementation in phases, gather feedback from key users, and refine workflows as you go. Keep leadership informed to reinforce momentum.

6. Celebrate wins

Whether it's cutting contract processing time from 7 days to 2, or reaching 80% self-service on NDAs, publicizing key milestones fuels adoption and boosts morale.

Case study: proof that CLM works

Peloton Consulting Group is a professional services firm helping organizations to envision and implement digital transformation. Using Conga Contracts for Salesforce (part of the Conga CLM portfolio), Peloton nearly doubled their contracting output while gaining 360-degree visibility into contract processes. By adopting automation, the team significantly reduced the time required to review and execute contracts.

Challenges:

- Manual processes lacked scalability as the business grew
- Limited ability to track and report on contract statuses
- Overwhelming legal requests across communication channels

Business outcomes:

- Contracting capacity increased by over 40%
- 50% of legal's time was reallocated to high-value activities
- 65% of MSAs now accepted without additional negotiation
- Contracts are executed in minutes, rather than days
- Increased speed to signature has positively impacted revenue

To learn more about Peloton's experience, you can [read the full case study here](#).

Need help getting started? Our [CLM implementation guide](#) provides more detailed guidance on how to plan and execute your implementation.

Best practices for long-term CLM success

Putting a CLM solution in place is a significant achievement, but long-term ROI means thinking beyond the go-live date. The true value of CLM comes with sustained adoption and a focus on continuous improvement.

Here are some tips and best practices to help ensure your CLM system remains effective, scalable, and strategically valuable over time.

- **Align your CLM to business goals**

CLM success is measured by business impact—not just system deployment. Define your goals up front and track how CLM supports broader objectives like accelerating revenue, improving compliance, reducing risk, and driving operational efficiency.

- **Establish ongoing CLM governance**

Establish a CLM governance council led by legal ops and reviewed quarterly by Legal leadership. This keeps adoption, compliance, and contract performance front and center—and ensures CLM continues to serve business and legal priorities equally.

- **Measure what matters**

Establish metrics that reflect both legal and business performance. Track KPIs like contract cycle time, percentage of self-service contracts, renewal capture rate, and contract risk exposure. Regular reporting creates accountability and identifies opportunities for improvement.

- **Evolve with AI**

Start by leveraging AI for low-risk, high-volume tasks like first-pass document review. Over time, expand AI usage into more advanced use cases like predictive risk scoring and AI-driven negotiation insights, to stay ahead of evolving legal and regulatory standards.

- **Future-proof your investment**

Choose a CLM partner—like Conga—with a proven track record of delivering enterprise-scale solutions and a clear roadmap for AI innovation. Look for a provider that is actively investing in integrations, analytics, and automation capabilities to support your long-term vision.

- **Engage cross-functional teams**

CLM is not just a tool for legal—it touches sales, procurement, finance, and more. Involve key stakeholders in process design and governance to ensure the platform meets the needs of teams across the organization.

- **Invest in enablement**

Remember that adoption is not guaranteed. Equip teams with ongoing training and clear playbooks to demonstrate how CLM improves their daily work. Establish incentives and workflows that encourage users to embrace automated contracting.

- **Iterate and optimize**

“Set it and forget it” doesn’t work for most software implementations—and CLM is no exception. Create a schedule for reviewing workflows, templates, and performance data. Use feedback loops to continually refine and improve the contracting process as your business evolves. Accelerating turnaround times or boosting self-service adoption builds internal momentum and demonstrate the value of CLM quickly.

Industry-specific CLM insights

Every industry faces unique contracting challenges—that’s why CLM is not a one-size-fits-all solution. Legal teams need a CLM that not only automates contracts but also has the capabilities to handle the specific regulatory pressures, compliance obligations, and operational challenges of their business sector.

CLM challenges vary dramatically by industry. A healthcare provider navigating HIPAA compliance faces a different risk landscape than a manufacturer managing supplier contracts across continents. Conga CLM is built to adapt—delivering trusted, AI-powered contracting tailored to your industry’s unique compliance and operational demands.

Pain points and CLM-focused solutions

The following is a snapshot of common pain points across key industries—and how an intelligent CLM solution can help to address them.

Industry	Top pain points	How CLM solves them
Technology	<ul style="list-style-type: none"> • Complex deal structures • High contract volume • Frequent renewals • Rapid deal velocity • Inconsistent clause usage 	<ul style="list-style-type: none"> • Speeds up turnarounds with standardized templates, clause libraries, and AI-powered contract review • Automates workflows to support self-service contracts
Manufacturing	<ul style="list-style-type: none"> • Large, complex supply chains • Difficulty maintaining compliance with global standards and regulations 	<ul style="list-style-type: none"> • Streamlines vendor agreements • Automates obligation tracking • Manages terms across jurisdictions • Flags risky and non-compliant clauses
Healthcare & life sciences	<ul style="list-style-type: none"> • Strict regulatory oversight (HIPAA, FDA, EMA) • Complex payer-provider and clinical trial agreements 	<ul style="list-style-type: none"> • Tracks compliance obligations • Surfaces risky language • Provides full audit history for regulators
Services & consulting	<ul style="list-style-type: none"> • Inconsistencies in project-based contracts • Need for quick turnarounds • High potential for scope creep • Missed obligations and renewals 	<ul style="list-style-type: none"> • Templatizes contracts to support self-service • Uses AI to detect scope creep • Tracks milestones and obligations • Automates renewal workflow
Financial services	<ul style="list-style-type: none"> • Heavy regulatory burden (SEC, SOX, FINRA) • Significant need for audit-readiness • High volume of third-party contracts 	<ul style="list-style-type: none"> • Provides real-time compliance reporting and visibility into obligations • Maintains clause libraries for compliance and audit trails • Automates review of third-party paper



CLM use cases by industry

The day-to-day use cases for CLM are practically limitless. Across every industry, legal teams can leverage this transformative technology to streamline agreements, improve visibility, and deliver business critical insights.



Technology

- Auto-generation of NDAs and MSAs
- IP clause tracking and deviation reporting
- AI-assisted contract review



Manufacturing

- Automated workflows for supplier onboarding
- SLA enforcement and risk alerts
- Multi-language template management for global deals



Healthcare & life sciences

- Automated agreement processing
- Regulatory clause tagging for FDA and HIPAA compliance
- Clinical trial contract approval routing



Services & consulting

- Dynamic SOW creation and change order tracking
- Contract renewal and milestone notifications
- AI-driven contract analytics for margin analysis



Financial services

- Third-party contract ingestion and AI clause comparison
- Regulatory reporting via contract metadata
- Automation to ensure internal policy enforcement

Choosing the right partner

With countless CLM providers in the market today, selecting the right one can feel overwhelming. It's critical to ensure that your chosen solution aligns with your organization's unique challenges and objectives.

Start by asking the right questions. Software demos can be slick and flashy, so it's important to stay focused and grounded. As you evaluate CLM providers, make sure you get satisfactory answers to questions about things like:

- **Functionality:** Does the solution include all the key features discussed above (automated reviews, template libraries, redlining, audit trails, etc.)?
 - **Scalability:** Can the solution handle your current contract volume? Will it scale to meet your needs as your business grows and becomes more complex?
 - **Automated workflows:** Is the solution flexible enough to manage all your contracting workflows and use cases?
 - **Document control:** How much control do you have over aspects like versioning and access rights?
 - **eSignature:** Does the solution include [integrated eSignature capabilities](#) to capture secure electronic signatures across any channel?
 - **Compliance:** How does the technology help you comply with applicable standards and regulations?
 - **Security & data residency:** What controls (encryption, access, audit logs) and regional data-hosting options are available to meet regulatory requirements?
- **Implementation and training:** What support is provided as you integrate the solution into your tech stack? Does your contract include user enablement and self-serve resources?
 - **Industry experience:** How long has the vendor offered this type of solution? Do they have a successful track record working with companies in your industry?
 - **Price:** Is the cost reasonable and competitive with similar offerings from other vendors? What is included in the price?



Why Conga?

Choosing the right partner is the single most important factor in CLM success. You need a provider that delivers predictable outcomes, understands the realities of legal, and supports adoption long after go-live. CLM implementations have a reputation for failing, but Conga delivers. With more than 10 years of proven CLM expertise, Conga is the clear choice for legal leaders who are ready to take action.

Conga is a pioneer and market leader in contract lifecycle management. Our category-leading CLM solution puts Legal back in control of every contract – from creation to renewal – while eliminating the manual work that drains time and focus.

Chosen by thousands of organizations, Conga CLM is a recognized leader with top customer satisfaction ratings. But don't take our word for it—here's proof:



#1 Leader



#1 Top Rated



4.2/5 star
average rating



8.7/10
overall score



Ready to see Conga CLM in action?
Schedule a demo today!



About Conga

The Conga Advantage Platform is chosen worldwide to accelerate the journey to become a more connected, intelligent business. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Powered by a unified data model and purpose-built AI, Conga helps companies achieve a unique advantage—one built on seamless connection, actionable intelligence, and scalable growth.

Conga delivers an advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, Colorado and has global operations in North America, Europe, Asia and Australia. Visit conga.com for more information.



For more information

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