



Contract Guardian Checklist

It is best practice to revisit the various aspects of your contract management system on a regular basis to confirm that the configuration settings are still appropriate for your organization.

We recommend that at a minimum you revisit your various settings and standards as you transition from one year to the next.

Checklist Items	
	Major Organizational Changes - Changes like addresses, phone numbers, and contacts for vendors that will be reflected throughout your system and automated communications.
	Email - Confirmation that all emails are deliverable.
	User Security - Confirmation that each user still has the appropriate access.
	Retention Policies - Review that the durations on your retention policies are still appropriate.
	Role Review - Analysis of your role structures.
	Reports - Review of reports, content as well as scheduled reports.
	KPI - Visit as frequently as possible to identify bottlenecks or sources of inefficiency in your workflow processes.
	Contract (Document Types) - What are the contract types most frequently used? Do you have any that might be considered duplicates or need revision? Is the meta data being captured still appropriate?
	Risk Engine Phrases - Are the current phrases still appropriate? Should you add new ones?
	Permissions - A quick glance at all of the permissions can highlight new features that are available to your organization that you might not be utilizing.
	Standard Documents - Contract Guardian allows you to have unlimited standard documents to be used as attachments on your email alerts. Check and see if they are still current and appropriate.
	Groups - Are the members of your various groups current?
	Generator Templates - Are they still current? Do you need to add new ones?
	Need Training? Perhaps a new contract manager or a subject matter expert has been added and has never been formally trained.

Intuitive Contract Management Software

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