Model N Contract Lifecycle Management

**CLM for the Enterprise**

Model N Contract Lifecycle Management (CLM) enables organizations to create and manage all types of sell-side contracts including: Service Contracts, Sales Contracts, NDAs, Statements of Work and many more. Built natively on Salesforce, Model N CLM enables users to work directly from within Salesforce or Microsoft Word®, and provides complete visibility and control of the entire contract lifecycle.

A library of standard templates simplifies contract creation. Contracts can be created with Model N CLM, directly from Salesforce accounts and opportunities, or created from quotes generated by either Model N CPQ or Salesforce CPQ. With Model N CLM, configurable products and pricing can be easily added, while using the search and insert feature from the built-in clause library facilitates customer contract requests. Intelligent Approvals quickly route the contract for review based on an analysis of contract type, products and terms, while providing on-going visibility into the status of the approval process.

With Model N CLM, sales, customers and legal teams can collaborate on contract documents using redlining in Microsoft Word® without the need to directly log into Salesforce®. Intelligent workflow automates the data flow between the Contract record and Contract document and keeps them in sync. Model N CLM provides secure, easy-to-use storage for contracts that increases user productivity and reduces business risk.

Model N CLM is an enterprise-grade contract solution and teamed with Model N CPQ provides the foundation for a complete enterprise-grade quote-to-cash solution.

- **End-to-end**: Enables the full contracting lifecycle from creation through amendments and renewals and tracks compliance and contract performance.
- **Interoperable**: Built-in ability to synchronize with ERP master data and seamlessly incorporates Microsoft® Word and Excel
- **Performance and scalability**: Advanced architecture incorporates performance engines and caching technology that scales to thousands of users

**Benefits**

- Simplify contract creation
- Shorten contract review and approval time
- Reduce sales time spent on contracts
- Facilitate collaboration using standards like MS Word
- Easy search of central contract repository
- Reduce errors and risk
- Simplify amendments
- Improve renewal rates
- Maximize lifetime value of agreements
- Gain insights into contracting KPIs
- Reduce effort and cost of audits
- Simplify administration and lower IT costs
**Simple, easy, familiar**
Model N CLM leverages Microsoft Word and Salesforce to make it fast and easy

- Documents reside in a secure, centralized, searchable repository
- Contract revision can be done directly in Word enabling faster easier collaboration
- Redlines in Word directly update the contract records and version control is automated

**Enable easy standardization and flexibility**
Use MS Word and drag and drop Salesforce fields to build template and clause libraries

- Library creation leverages approval workflows to ensure review and governance
- Import 3rd party paper to create contracts based on customer documents
- Create a single document package containing multiple independent documents

**Streamline the end-to-end contract lifecycle**
Visual contract lifecycle helps users manage the entire contract process

- Create specific lifecycles for each contract type used in Model N CLM
- Automate renewals of service agreements and prorated credits for termination
- Easily find and amendment structured contract data and documents
- Search, approve and manage contracts using mobile devices
- Integration with digital signature

**Track products and services from quote through contract lifecycle**
Simplify conversion of quotes into contracts and keep track of contract performance

- Accelerate renewals and amendments with visibility to services and installed products
- Ensure visibility to contract compliance and performance to maximize revenues

**Bring intelligence to the contract process**
Dashboards provide quick visibility into contract activity KPIs, pending renewals

- Comprehensive Data mart enables rich reporting capabilities
- Analysis of contracts for risk and non-standard clauses

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**Key Features**
- Easy, cloud solution
- Standard template and clause library
- 1 click quote to contract
- Visual workflow with next best action recommendations
- Automated version control and audit trail
- Interoperable with Microsoft Word and Salesforce
- Searchable clause library with drag and drop insert
- Import 3rd party paper
- Intelligent approvals with conditional routing
- Create, approve and manage contracts on mobile devices
- Dashboards for contract analysis, tasks and KPIs
- Authoring, edits and redlines in MS Word
- Secure, searchable central contract repository
- Contract alerts and notification
- Salesforce Lightning UI-enabled