



CLM Selection: 8 Questions Legal Teams Should Answer Before They Buy

And how those answers become the requirements that drive your CLM shortlist.

Most CLM evaluations begin with demos and feature lists. The better starting point is a clear view of your own gaps, problems, and constraints. These eight questions surface that view.

1. What questions about your existing contracts can you not answer today?

Can you see average close times, how long contracts sit with the counterparty versus in-house, every agreement containing a specific clause, renewal date, or each data-breach notification requirement? The gaps that matter most to the business are the ones that should drive feature requirements.

2. What questions do your GC, board, or leadership already ask that Legal cannot cleanly answer?

Boards and GCs want to know where risk concentrates, which contract clauses were redlined or non-standard, how long deals are stuck, and the true risk profile of the customer base. Whether customers are committed to ARR or hold broad termination-for-convenience rights is the kind of question that turns into a scramble when the data is not already sitting in one place.

3. Which other systems does the CLM need to connect to AND why?

List the systems and the concrete reason each connection matters. The real goal is often taking contracts out of email, ensuring everyone works from the correct and most recent negotiated version, or giving finance accurate obligation data. Integration exists to remove specific friction.

4. Do you have internal capacity to handle integrations, configuration, training materials, and system documentation, or will you need external help?

Configuration, data migration, integrations, process documentation, and training content all require time. Most lawyers do not have bandwidth for this work. If the capacity does not exist inside the company, it becomes a professional services cost that must be planned from the start.

5. Who will own the system after go-live, and do they have the time and authority to maintain it?

Implementation and ongoing maintenance are different jobs. Building workflows, templates, and integrations is a project. Keeping the system current, enforcing standards, and driving continued use is permanent ownership. Many teams discover too late that the person expected to maintain the system lacks either the time or the authority to change business processes and drive adoption. The practical need is often a system built cleanly once, so Legal can maintain it without having to construct it.

6. How will the system fit the way people already work?

People resist new interfaces. Core actions need to feel native. Starting a workflow with a single visible button in the tool they already open, automatic license provisioning through existing SSO

instead of manual account requests, or working inside the document editor they already use. Any extra login or extra step becomes friction that reduces adoption.

7. What does a realistic first 90 days look like, and what early success metrics will you track?

To ensure success, define the success metrics around things you can control. New contracts can start in the new system on day one. Contracts already in negotiation will finish in the old process and may take weeks or months to close. Define a phased cutover with a clear retirement date for the old system and a ramp-up period matched to your deal velocity. Measures aren't the goals. Write concrete early metrics which indicate success, not define it. Are people using the designed workflows? What percentage of new contracts are created in the system? Did users complete training? If usage is low, then why? Early success is measured by whether the process is being followed, not by business outcomes that require a full year of volume.

8. Once the requirements are clear, what is the realistic total cost?

License cost is the visible number. In practice it is often only about 1/3 of the real three-year cost once you add professional services, integrations, training, documentation, and the internal capacity required to run the system. When the first seven questions are answered, this number stops being a surprise and becomes a planned investment range.

Bonus: Turning the answers into requirements

Here is the usable version. Each answer produces a concrete requirement you can actually put in front of a vendor or an internal stakeholder.

1. **IF** you still cannot answer basic questions about cycle time, counterparty delay, or data-breach notification obligations
THEN the system must provide a searchable repository with automated status tracking, obligation alerts, and reportable fields for close time and notification triggers.
2. **IF** leadership already asks questions about risk concentration, non-standard language, or customer commitment that Legal cannot answer cleanly
THEN the system must surface risk concentration, non-standard clause usage, and customer commitment status in standard reports without manual data pulls.
3. **IF** the real need is to pull contracts out of email and guarantee the correct, most recent negotiated version
THEN the system must enforce version control with a single source of truth and prevent concurrent editing of outdated drafts.
4. **IF** lawyers will not have time to create training materials and process documentation
THEN implementation must include complete process documentation, role-based training materials, and recorded walkthroughs as a deliverable.
5. **IF** the person expected to maintain the system lacks authority or bandwidth
THEN the system must be configured so that ongoing maintenance can be performed by Legal without requiring continuous technical build work.
6. **IF** people will only adopt the system when core actions feel native to their existing tools and habits
THEN the system must support single-click workflow initiation from the primary business application and automatic user provisioning through existing SSO.

7. **IF** deal velocity means in-flight contracts will take weeks or months to clear
THEN the implementation plan must include a defined transition period, a hard retirement date for the legacy process, and early usage metrics that test whether new contracts are entering the system as designed.
8. **IF** the first seven answers are clear
THEN the total cost estimate must itemize software, professional services, integrations, training, documentation, and ongoing internal ownership so the investment range is known before any contract is signed.

This list is not a comprehensive requirements list. It is a starting point that surfaces the decisions most teams leave too late. This is why at Vindexus we developed CLM Select. CLM Select tracks over a hundred requirement data points across process fit, integrations, ownership, adoption, and total cost, then matches you with the software tools that actually fit your business requirements, taking the guess work out of building your legal tech stack. You'll get a clear report of the methodology used, business case, and project outline you can take to stakeholders.

If you want the full picture for your team, visit us at vindexusgroup.com or reach out to us at contact@vindexus.co.

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