

The Agreement Intelligence Lifecycle



Introduction	2
The evolution from CLM to Agreement Intelligence	3
What is the Agreement Intelligence lifecycle?	5
Benefits of Agreement Intelligence for the office of the CFO	8
Best practices for implementing Agreement Intelligence	13
Case studies: Agreement Intelligence in action	16

Introduction

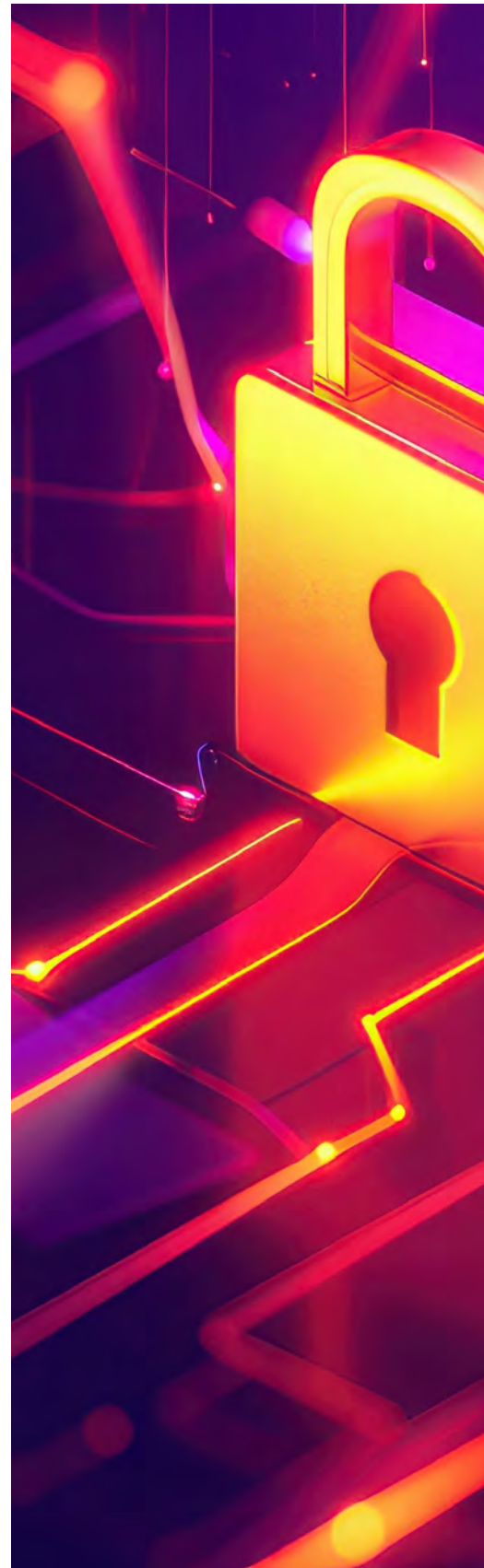
Over the past few years, the way organizations manage contracts has begun to evolve in remarkable ways. With AI-powered technologies and automated workflows, contract management is setting searchable data free from static files, and putting it to work.

We're now in an era of Agreement Intelligence, a step beyond old-school contract lifecycle management (CLM).

This new approach gives the whole office of the CFO — finance, operations, procurement, and legal ops — a clearer view into contract details, obligations, and value, empowering them to act faster, cut costs, and reduce risks across their departments.

For these teams, the shift to Agreement Intelligence means they can leverage contracts as living assets, whose data helps leaders forecast cash flow, control costs, and manage risks in real time. Contract metadata enables stakeholders to automatically track deadlines, surface financial obligations, forecast expenses, and recognize revenue.

This ebook breaks down the **Agreement Intelligence lifecycle**, showing how each stage enables your team to act with confidence and agility. Whether you're looking to reduce manual workloads, enhance compliance, or integrate contract data across platforms, Agreement Intelligence is here to make your contract management smarter, faster, and more strategic.



The evolution from CLM to Agreement Intelligence

Back in the 2010s, contract lifecycle management (CLM) systems were a big leap forward. They brought digital storage, e-signing, and basic organization to contracts.

But in practice, traditional CLM falls short. Only companies with big budgets and dedicated resources have been able to make CLM work to its full potential. For many businesses, it requires a lot of manual data entry, and expensive professional services engagements for setup, not to mention maintenance.

For most teams, that level of investment just isn't realistic. What's needed is a way to turn contracts into valuable, actionable assets — without the high costs and time commitments. That's where Agreement Intelligence steps in.

Agreement Intelligence doesn't just manage contracts — it unlocks the data inside them.

By automating data extraction, organizing contract details, and connecting easily with other tools, Agreement Intelligence makes it possible for companies of all sizes to tap into the real value of their contract data. Here's how it works:

- **No more manual data entry:** Traditional CLM systems require teams to manually enter key details — dates, payment terms, renewal deadlines — which is slow and error-prone. Agreement Intelligence changes that by using AI to extract this data automatically as soon as contracts are imported. This saves hours of work, ensures accuracy, and lets your team focus on higher-value tasks.



- **A single source of truth:** Traditional CLM often isolates data in individual documents, making it hard to access or analyze. Agreement Intelligence organizes all contract data in one central, searchable repository. Every contract is now a source of insights, available whenever you need it.
- **Never miss a deadline:** In traditional CLM, visibility into contract terms, obligations, and deadlines is limited by static data. Agreement Intelligence provides real-time access to all contract metadata, so you can monitor key terms, track compliance, and stay on top of renewals. This helps teams in finance, operations, procurement, and legal make proactive, data-driven decisions.
- **Automated workflow steps:** With traditional CLM, managing approvals and deadlines often means endless manual follow-ups. Agreement Intelligence automates workflows, routing contracts for approval, moving contracts into specified folders, and making sure no steps get missed. This keeps things moving smoothly and reduces bottlenecks.
- **Integrations with third-party platforms:** Traditional CLM often operates in a silo, disconnected from your CRM, ERP, or project management tools. Agreement Intelligence integrates seamlessly with platforms like Salesforce, HubSpot, and Google Drive, so your contract data flows wherever you need it. This gives everyone a unified view of contract information across the business.

With Agreement Intelligence, contract management isn't just easier — it's transformed. Instead of sitting idle, contracts become active assets that help your teams make smarter decisions, streamline processes, and ultimately drive growth.

What is the Agreement Intelligence lifecycle?

The Agreement Intelligence Lifecycle shifts contract management from just “filing and storing” to truly making contract data useful across the business. It’s not about just housing contracts — this approach taps into the details within each agreement to help you make informed decisions, speed up workflows, and support your overall strategy.

Stage 1. Import documents

Stage 2. Extract metadata

Stage 3. Search and filter metadata

Stage 4. Export metadata reports

Stage 5. Automate with workflows

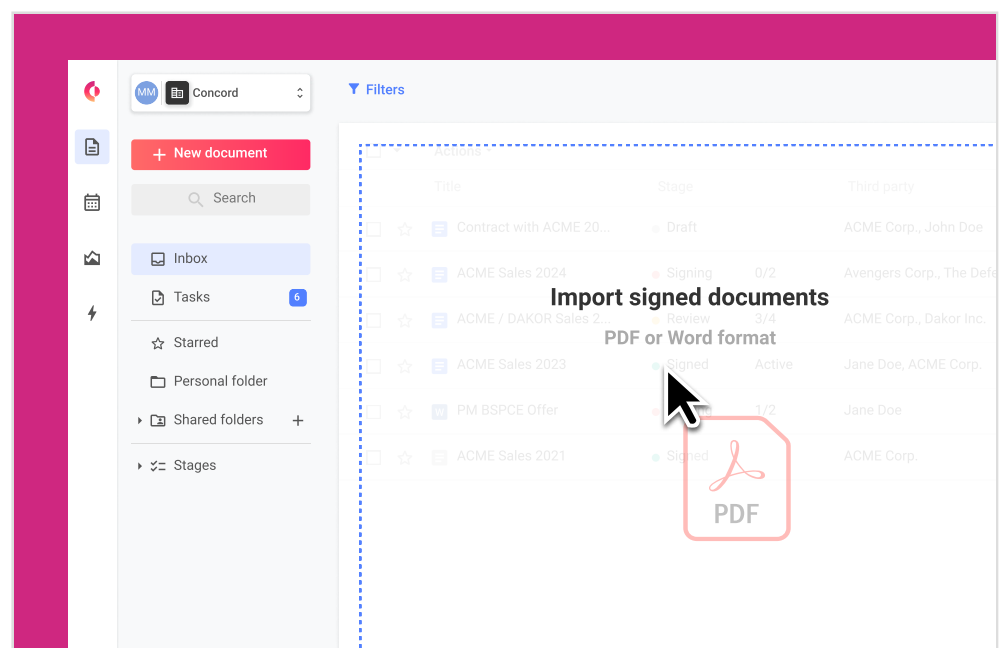
Stage 6. Use metadata in integrations

Here’s how each stage of the lifecycle works:

Stage 1. Import documents

centralize your contracts in one place

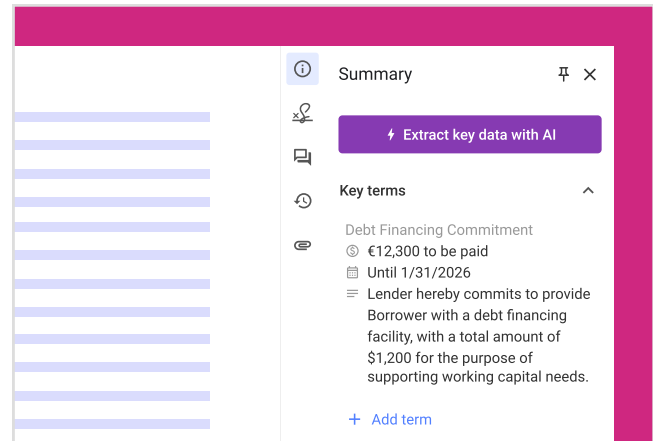
Start by gathering all your contracts in one secure, searchable repository. Drag-and-drop functionality makes it easy to upload single files or even large batches of documents. With everything in one place, finding a specific contract or viewing all active agreements at once becomes far simpler.



Stage 2. Extract metadata

unlock essential information

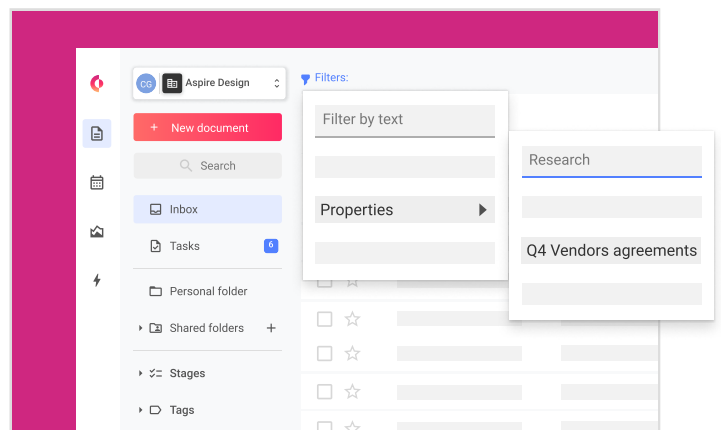
Once your documents are imported, AI goes to work extracting the important details automatically — dates, renewal terms, payment schedules, and more. Want to capture custom data, like project milestones or vendor locations? Just create and apply custom fields specific to your needs. By bringing all this data to the surface, you get instant access to what matters most in each contract.



Stage 3. Search and filter metadata

find what you need instantly

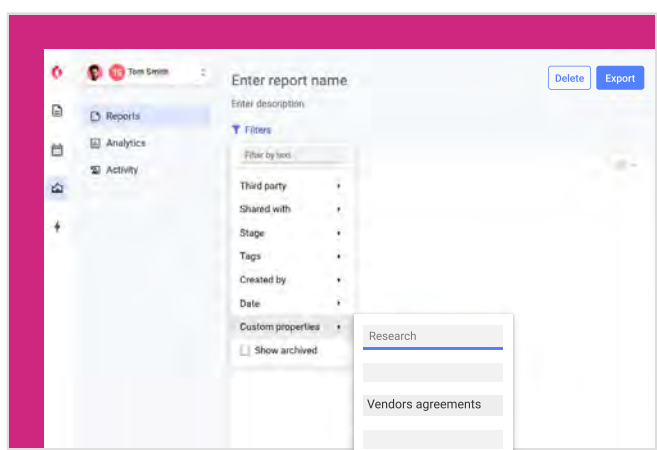
With key data extracted, you can search and filter contracts by nearly any data point. Need all vendor agreements signed in Q4 last year? Or maybe every contract exceeding a set dollar amount? A few clicks get you the exact information you're looking for, saving hours of manual work and keeping you informed on the spot.



Stage 4. Export metadata reports

turn contract data into useful insights

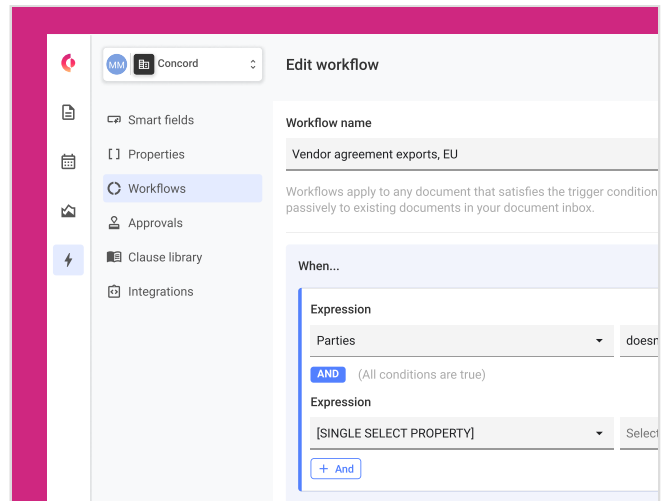
With Agreement Intelligence, exporting contract data is as simple as it gets. Select the exact data points you want, apply any filters you need, and export to Excel or CSV for analysis or sharing. Whether you're tracking contract renewals, reviewing compliance, or analyzing vendor spend, these reports help you turn contract data into insights that align with your broader goals.



Stage 5. Automate with workflows

free your team from repetitive labor

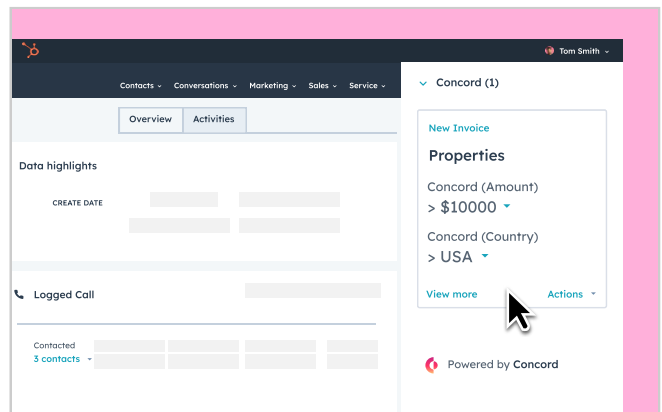
Automated workflows make it easy to handle contract steps efficiently. For example, you can set contracts to automatically route for approvals, notify team members of upcoming renewals, or move documents into specific folders. By setting up workflows, you free up your team from repetitive tasks and reduce the risk of missing important steps.



Stage 6. Use metadata in integrations

sync contract data with the tools you use

Integrate contract data with other key business systems to keep all teams aligned. With open API connections, contract information flows into your CRM, ERP, or other essential platforms, so teams across finance, sales, and operations have the same up-to-date information. This means better collaboration and consistency across the board—all while keeping your data secure.



The Agreement Intelligence Lifecycle makes contracts more than just documents. Instead of just storing files, it helps you actively use the data inside them — whether that's for faster workflows, informed decisions, or better planning. In every stage, Agreement Intelligence turns contracts into assets that support your organization's growth.



Benefits of Agreement Intelligence for the office of the CFO

Agreement Intelligence gives the whole office of the CFO deeper visibility into contracts, making it easy to get actionable insights when and where they're needed.

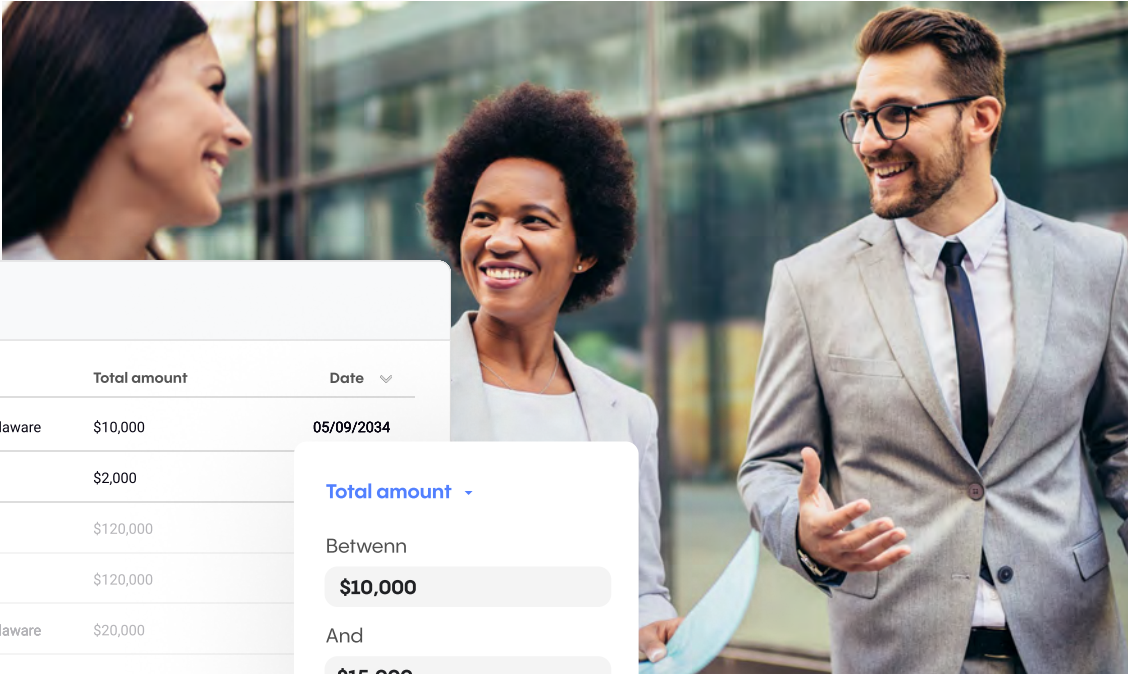
With data centralization, automated workflows, and instant access to contract terms, every team under the CFO's umbrella — finance, operations, procurement, and legal ops — can make faster, data-backed decisions that drive results.

Here's how each team gains specific benefits from using Agreement Intelligence.

For finance teams: data-driven financial planning, simplified

Finance teams need accurate, up-to-the-minute contract information to manage cash flow, forecast budgets, and keep costs in check. Agreement Intelligence delivers these insights effortlessly, so finance can stay ahead of the numbers.

- **Track revenue and expenses:** Automated data extraction updates payment schedules, renewal dates, and revenue triggers as contracts are signed. This means finance can see expected inflows and outflows at a glance, making cash flow forecasting more predictable and accurate.
- **Get early alerts on costs:** Notifications flag upcoming payment deadlines, renewals, and penalties before they hit. By proactively managing these expenses, finance can avoid late fees, secure early discounts, and avoid unwanted auto-renewals.
- **Align budgets with real-time data:** With a clear view of upcoming financial obligations, finance can allocate budgets to meet contractual needs. This reduces unplanned spending and ensures funds are available where they're needed.



Filters: **Total amount** ▾

Title	Total amount	Date ▾
🕒 2024 Sales contract with J. Delaware	\$10,000	05/09/2034
🕒 NDA - Gill Mc Adams	\$2,000	
🕒 Employee Offer Letter	\$120,000	
🕒 Purchase Agreement	\$120,000	
🕒 2019 Sales contract with J. Delaware	\$20,000	
🕒 Sales contract with J. Delaware	\$120,000	

Total amount ▾

Between

\$10,000

And

\$15,000

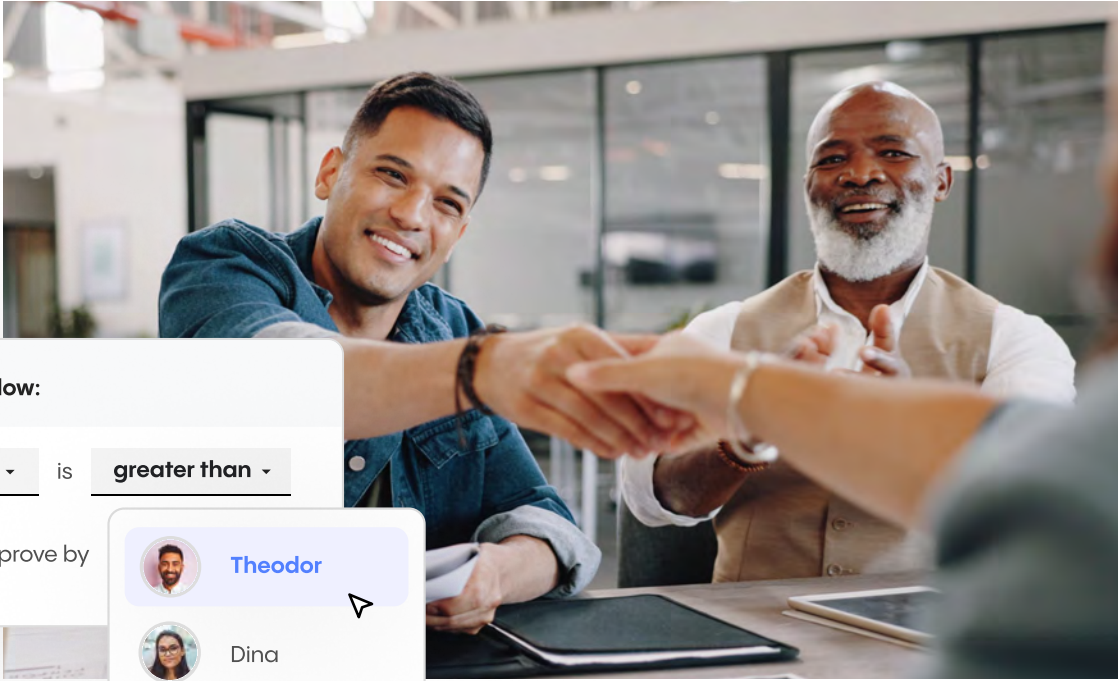
🔍 Search

For operations teams: smoother workflows, fewer bottlenecks

Operations teams depend on efficient workflows to keep everything running smoothly. Agreement Intelligence helps by automating contract-related tasks and centralizing access to contract information.

- **Automated approvals:** With built-in workflows, contracts go straight to the right stakeholders, eliminating manual follow-ups and speeding up approvals. This keeps projects moving without delays.
- **Better resource planning:** Real-time access to contract obligations, like delivery dates or service-level agreements, enables operations to allocate resources exactly where they're needed, keeping downtime to a minimum.

Quick access to contract details: Operations can easily pull up the latest contract terms, allowing them to address project needs faster, communicate clearly with other departments, and avoid unnecessary delays.






The image shows a composite of two men shaking hands in a modern office setting. Overlaid on the bottom left is a software interface for creating an approval workflow. The interface includes a dropdown menu for 'Contract amount' with a value of '\$ 200,000.000' and a condition 'greater than'. Below this, there is a list of three people: Theodor, Dina, and Cameron, each with a circular profile picture. The name 'Theodor' is highlighted with a blue background and a mouse cursor arrow pointing to it.

Create approval workflow:

If **Contract amount** is **greater than**

\$ 200,000.000 approve by

-  **Theodor**
-  Dina
-  Cameron

For procurement teams: stronger vendor relationships, lower costs

Procurement teams need reliable data to manage vendor relationships and control costs. Agreement Intelligence gives procurement instant access to vendor terms, performance metrics, and deadlines, making it easier to negotiate and optimize agreements.

- **Track vendor performance:** Agreement Intelligence keeps tabs on timelines, service levels, and quality metrics, giving procurement a clear view of each vendor's reliability and performance over time.
- **Save with timely renewals:** Automatic renewal alerts let procurement negotiate terms in advance, secure bulk discounts, or extend contracts to avoid unexpected cost increases.
- **Centralized vendor data:** With all vendor contracts in one place, procurement can easily compare terms across suppliers, streamline the selection process, and make smarter sourcing decisions.

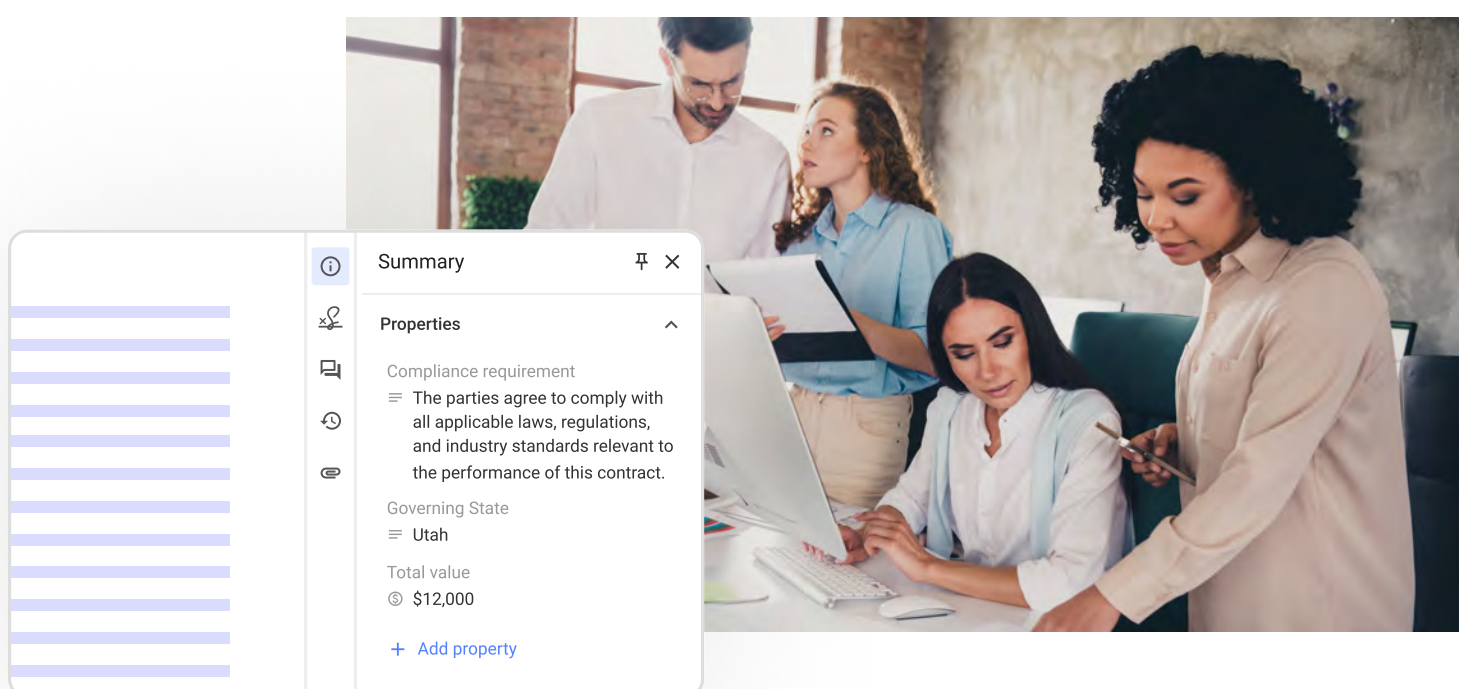


For legal ops teams: faster reviews, lower risk

Legal ops teams need to ensure contracts are compliant and manageable across the organization. Agreement Intelligence gives legal ops real-time access to contract data, speeding up reviews and minimizing manual work.

- **Assess risks quickly:** Legal ops can filter contracts by risk factors, like contract value or jurisdiction, to prioritize high-risk agreements and address potential issues before they become problems.
- **Share data across teams:** By making contract data accessible, Agreement Intelligence allows legal ops to collaborate more easily with finance, procurement, and operations, reducing bottlenecks and improving alignment.
- **Find terms fast:** Legal ops can quickly search by terms, clauses, or compliance requirements, saving time on document retrieval and speeding up contract reviews.

With Agreement Intelligence, the office of the CFO can finally move beyond manual contract handling to a streamlined, data-driven approach. Each team — finance, operations, procurement, and legal ops — gains better visibility and control, enabling them to work more strategically. Contracts become dynamic tools that support growth, drive value, and keep the organization aligned.



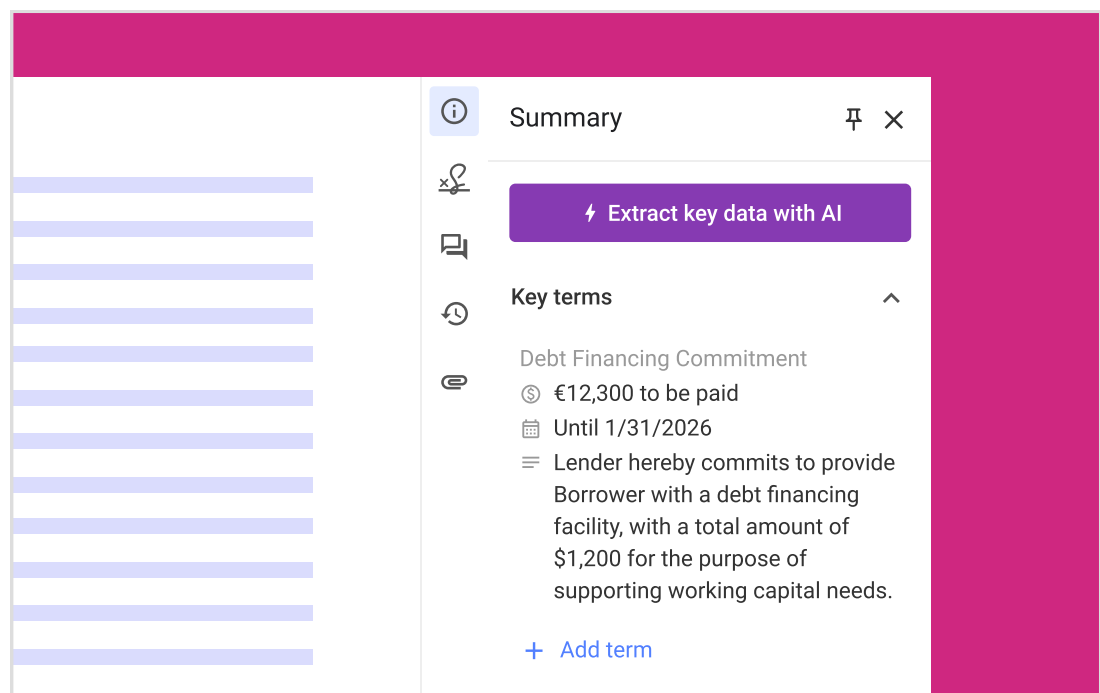
Best practices for implementing agreement intelligence

Adopting Agreement Intelligence doesn't have to feel like a drawn-out, complicated process. Unlike traditional contract lifecycle management (CLM) systems that often come with steep learning curves, complex configurations, and months of setup, Agreement Intelligence is designed to get your team up and running quickly. It's about unlocking value from your contracts without bogging down your business.

Here's how to make the most of it:

1. Start small with high-impact use cases

Don't try to overhaul your entire contract management process at once. Instead, focus on one or two areas where Agreement Intelligence can make an immediate difference. For example, use AI to extract metadata from your most critical contracts, or automate renewal tracking. These small, targeted wins demonstrate the platform's value right away.



2. Get key stakeholders involved without overcomplicating it

You don't need weeks of meetings to gather input from every department. Instead, show key stakeholders a few real-world examples of what Agreement Intelligence can do — like pulling payment terms from hundreds of contracts in seconds or setting up deadline reminders. When people see how it solves their specific challenges, buy-in happens naturally.

3. Use the built-in tools to hit the ground running

Forget the endless customizations that come with older systems. Agreement Intelligence comes with pre-built workflows and metadata extraction tools that work out of the box. This means your team can start organizing and acting on contract data within days, not weeks.

4. Let AI handle the heavy lifting

Manual data entry is one of the most painful parts of traditional CLM implementation. With Agreement Intelligence, AI takes care of extracting key terms like dates, renewal deadlines, and payment obligations. It's fast, accurate, and eliminates hours of tedious work — so your team can focus on more strategic tasks.

5. Automate workflows without involving IT

Setting up workflows in traditional CLM can feel like learning a whole new system. Agreement Intelligence makes it simple. Whether it's routing contracts for approval or setting up deadline alerts, the platform's intuitive interface means you don't need an IT team to make it happen.

6. Focus staff training on immediate value-adds

With legacy CLM systems, getting your team up to speed often requires weeks of training. Agreement Intelligence is intuitive enough that most users can pick it up with minimal guidance. Focus your training sessions on key features like metadata search and automated workflows that will have an immediate impact.

7. Set up the integrations you'll actually use

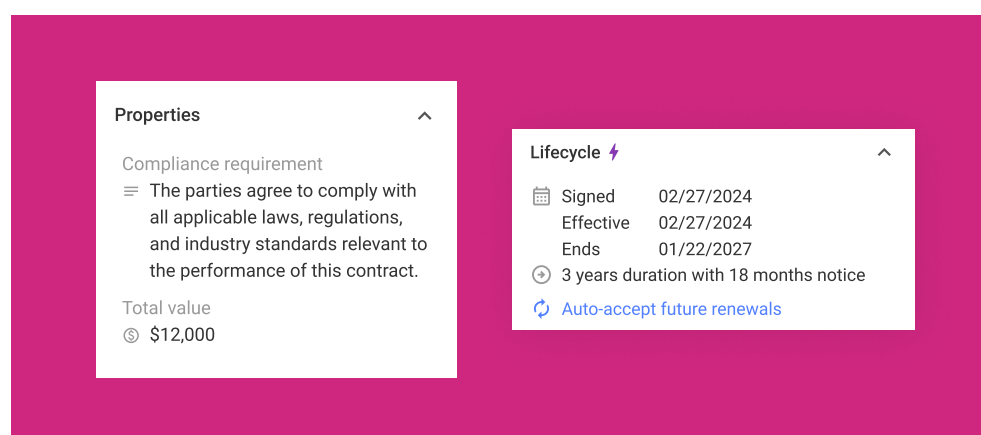
Instead of trying to connect Agreement Intelligence to every system your organization uses, start with the ones that matter most — like Salesforce for sales teams or HubSpot for marketing. These integrations make it easy to connect contract data with the tools your teams already rely on, without overcomplicating the rollout.

8. Keep stakeholders on the same page

One of the biggest frustrations with traditional CLM is siloed information. Agreement Intelligence fixes this by centralizing contract data, giving every team — from finance to legal — access to the same insights. This helps reduce confusion, avoid duplication, and guide your team toward clearer consensus on key decisions.

9. Add metadata, but don't overthink it

You don't have to define every possible metadata field right away. Start with the essentials — like contract value, renewal dates, or compliance terms — and build from there. Agreement Intelligence is flexible, so you can add new properties as your team discovers what's most useful.



10. Learn and improve as you go

Agreement Intelligence isn't a "set it and forget it" system. Once your team is using it, pay attention to what's working and what could be better. Gather feedback, make adjustments, and continue building on the foundation you've created. The platform is designed to grow and adapt alongside your business.

Following these best practices will help you unlock its full potential, turning contracts into strategic assets that add value for finance, operations, procurement, and legal ops. Each team will have the tools they need to make proactive, informed decisions, making Agreement Intelligence a valuable driver of your organization's growth and success.

Case studies: Agreement Intelligence in action

Seeing the transformative power of Agreement Intelligence in real-world scenarios illustrates the tangible value it brings to organizations. Whether streamlining processes for a payment solutions provider or optimizing document management for a construction leader, these case studies highlight how Agreement Intelligence supports operational efficiency, compliance, and strategic decision-making.



Melissa Hyde
Senior Sales Operations
Analyst at PAAY

PAAY

PAAY – boosting compliance and efficiency in payment solutions

For PAAY, a leader in secure payment solutions, managing contracts effectively is more than a business necessity – it’s a regulatory requirement. Operating in a highly regulated industry with a growing client base, PAAY faced challenges in keeping contracts organized, tracking critical deadlines, and maintaining compliance standards.

Document organization, version control, and renewal tracking had become time-consuming tasks that limited the team’s ability to focus on strategic goals. PAAY needed a solution that could simplify these processes while keeping up with the fast-paced demands of the payment industry.

KEY OUTCOMES:

- **40% faster contract negotiations**

PAAY significantly reduced the time spent negotiating sales agreements by automating key processes, such as data extraction and approval workflows. These improvements freed up time for their team to focus on building client relationships and closing deals.

- **Increased efficiency through automation**

Manual tasks like tracking document versions and monitoring renewals became a thing of the past.

“We can bring in PDFs and Word docs that were created and signed in any platform, and Concord pulls out the data we need with just a click,” says Hyde.

This automation not only saved time but also allowed the team to shift their focus to high-value activities like client engagement and strategic planning.

- **Centralized document access**

By storing all contracts in a single, secure location, PAAY eliminated the need to search across multiple systems for the latest agreements. Team members gained instant access to the most up-to-date versions, ensuring seamless collaboration across departments and avoiding miscommunication.

THE IMPACT:

For PAAY, adopting Agreement Intelligence didn't just address their compliance and organizational challenges — it transformed how their team operates. By centralizing contract management, automating manual tasks, and reducing time spent on administrative work, PAAY gained the agility to adapt to a fast-moving industry while staying focused on their clients and strategic goals.



Jenny McMullen
Corporate contract
administrator



Yates Construction – streamlining document management in construction

Yates Construction, a prominent leader in the construction industry, handles a high volume of contracts daily, spanning subcontractors, suppliers, and clients. Their projects are marked by complex timelines and strict compliance requirements, making effective contract management essential.

Before implementing Agreement Intelligence, Yates faced recurring challenges with managing document versions, organizing contracts, and tracking renewals. These inefficiencies posed risks to project timelines, compliance obligations, and overall operational efficiency.

KEY OUTCOMES:

- **Thousands of dollars per month saved on labor costs**

With dozens of administrators working across multiple projects, the manual tasks of locating, updating, and organizing contracts added up to significant labor costs. By centralizing contracts and streamlining workflows with Agreement Intelligence, Yates reduced document handling time and saved thousands of dollars each month.

“When you think of all of the dozens of administrators in the company doing this on all of our projects, that adds up to significant savings every month in labor hours,”

explains Jenny McMullen, corporate contract administrator

- **Faster document access across multiple sites**

Yates's projects span multiple locations, requiring seamless collaboration between project managers, on-site teams, and administrative staff. With Agreement Intelligence, contracts became accessible in real time from any location, ensuring that all stakeholders had the information they needed at their fingertips. This capability eliminated delays caused by missing documents, enabling smoother communication and better project alignment.

- **Strengthened compliance and risk management**

In the highly regulated construction industry, missing a compliance deadline can lead to costly project delays or legal complications. Yates used Agreement Intelligence to track critical compliance requirements like contract renewals, insurance terms, and regulatory deadlines. Automated reminders ensured that nothing fell through the cracks, while audit trails provided a clear record of changes and approvals, reducing risk and building accountability.

THE IMPACT:

For PAAY, adopting Agreement Intelligence didn't just address their compliance and organizational challenges — it transformed how their team operates. By centralizing contract management, automating manual tasks, and reducing time spent on administrative work, PAAY gained the agility to adapt to a fast-moving industry while staying focused on their clients and strategic goals.



Michael Cuschieri

Group Head of Legal,
LeoVegas



LeoVegas – improving regulatory compliance in online gaming

LeoVegas, a global leader in online gaming, operates in one of the most complex regulatory environments in any sector. Managing a diverse portfolio of brands across multiple jurisdictions, each with specific licensing requirements, makes contract management a critical function of their operations.

Before adopting Agreement Intelligence, LeoVegas relied on a manual process to extract key contract data and track critical clauses. Without a centralized, searchable repository, risk assessments and strategic decision-making were time-consuming and inefficient, creating bottlenecks across the organization.

KEY OUTCOMES:

- **400% faster contract analysis**

With Agreement Intelligence's custom properties, LeoVegas transformed how they manage critical contract data. By tagging and categorizing key elements – such as payment terms, change of control provisions, and market applicability – the legal team reduced a manual review process that once took weeks to just a single afternoon. Group Head of Legal Michael Cuschieri reflected on the change:

“The only way to do it was to dive into folders, open documents one by one, and sift through the clauses. That used to take weeks.”

- **Improved visibility and actionable insights**

Custom property tags allowed LeoVegas to associate contracts with specific brands and jurisdictions, creating clarity across their global operations. The team now generates detailed reports and retrieves critical information with ease.

Paralegal Thomas Parkin explained the shift: “Now, custom properties allow us to extract reports that show which markets and brands are tied to specific contracts.” These insights empower the team to make faster, more strategic decisions while improving operational alignment.

- **Simplified compliance tracking and risk management**

Compliance in the gaming industry is non-negotiable. With Agreement Intelligence, LeoVegas can efficiently track clauses like change of control provisions and termination terms to ensure they meet licensing and regulatory requirements. Automated tagging and filtering simplify reporting obligations to stakeholders and financial markets, reducing the risk of legal challenges and ensuring adherence to complex cross-border regulations. By centralizing compliance tracking, the legal team can quickly analyze commitments and reduce the time spent managing audits.

THE IMPACT:

LeoVegas’s adoption of Agreement Intelligence demonstrates how a tailored approach to contract management can drive efficiency, improve compliance, and enhance strategic decision-making. By replacing manual processes with intelligent automation and centralized reporting, LeoVegas has optimized its operations and reduced risks. In an industry where regulatory demands are constantly evolving, Agreement Intelligence has given LeoVegas the tools to stay agile, compliant, and focused on growth.

These case studies show how Agreement Intelligence unlocks value across many different industries:

- At PAAAY, it simplified compliance and freed up the team to focus on clients instead of administrative tasks in the fast-paced payment solutions world.
- At Yates Construction, it helped teams stay aligned and meet compliance requirements, even with staff spread across multiple project sites.
- And at LeoVegas, it cut down on manual work and sped up decision-making, making it easier to navigate the nuances of online gaming regulations.

Conclusion

Agreement Intelligence empowers companies of all sizes — not just large enterprises with massive budgets and teams — to work smarter, stay ahead of compliance needs, and make data-driven decisions that drive real impact.

For finance, operations, procurement, and legal ops, Agreement Intelligence transforms contracts into valuable, dynamic assets that support everything from cash flow forecasting to regulatory tracking.

As we've seen in the real-world examples from PAAY and Yates Construction, Agreement Intelligence takes contract management from a necessary chore to a strategic advantage. By automating repetitive tasks, centralizing documents, and providing instant insights, it frees up your teams to focus on what really matters: growing the business, building partnerships, and reducing risk.

If you're ready to take contract management to the next level, Agreement Intelligence offers the tools to do it — all while keeping your organization agile, compliant, and prepared for the future. The question isn't whether you should adopt Agreement Intelligence, but when you're ready to unlock its full potential for your team.

