

ULTIMATE GUIDE

# Key features of CLM and its benefits for business

 Bigle Legal



# Index

1. Introduction	3
2. <b>Document automation</b> : what is it and what is it for?	4
3. <b>Contract Management</b> : the next evolutionary step	8
4. <b>Smart workflows</b> : scaling collaboration across teams	11
5. Secure and facilitate a <b>centralised contract negotiation</b>	16
6. <b>Advanced electronic signature</b> : the future is now	19
7. Digitise your business with the latest in <b>integrations and customisation</b>	21
8. About Bigle Legal	25



# 1

## Introduction

In the professional sphere, technology is a means of optimising efforts, resources and time. Through discoveries, breakthroughs, and the creation of new applications, **the purpose of technology is to improve people's lives.** Contract Lifecycle Management (CLM) technology is the key factor revolutionising companies' document processes.

**CLM is a tool that automates, secures, streamlines and facilitates, from start to finish, the entire lifecycle of contracts and other types of documents.** The emergence of CLM represents an unprecedented breakthrough in the field of documents, an everyday element for everyone in the workplace. A multi-faceted tool that eliminates legal contingencies, prevents millions in losses and eradicates repetitive tasks that stifle routine.

**This ebook analyses the main functionalities of CLM, a technology that is already saving millions for large corporations.** What are the functionalities of CLM for companies? How does it help the legal area to be more efficient? What are the processes it covers? What features should this versatile software include? How to choose a CLM at the forefront of the market?

Understand how this technology - that helps companies in all kinds of sectors- changes the way teams work and becomes an unprecedented competitive advantage.



# 2

## Document automation: what is it and what is it for?

Document automation makes it possible to **create tailor-made legal documents error-free and 90% faster** than in the traditional way.

### WHAT IS IT FOR?

Its technology allows companies to generate contracts and any legal document in the most effective way, to avoid hours and hours of copying, pasting and drafting. This functionality transforms any company's contract templates into an attractive and intuitive form that helps to create customised, error-free legal documents in a matter of minutes.

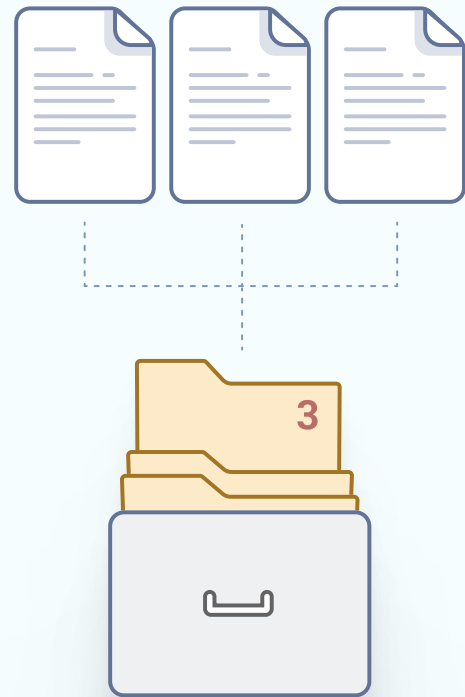
In this easy way, completing the documents becomes a straightforward, fast and secure task. A process accessible to anyone who works with documents: without being an expert in legal matters, the user can generate contracts autonomously and without any error, always following the guidelines of the legal department and in accordance with current legislation.



## Clause library: standardise and speed up document creation

Companies have clauses that are systematically used in hundreds of documents. Content that is repeated in more than one template, such as a data protection clause, can be created as sub-templates and used as many times as necessary. In this way, **when these sub-templates are modified on the platform, all templates containing them will be automatically updated.**

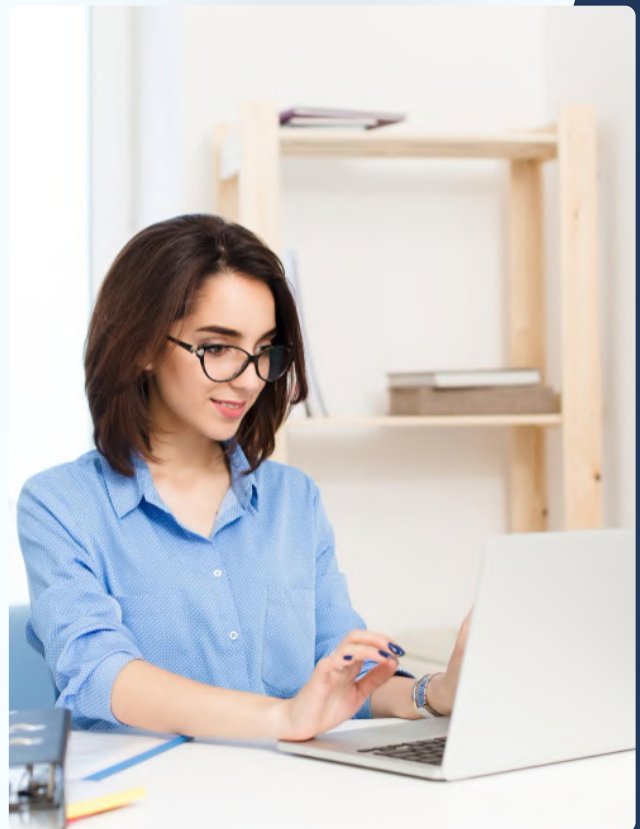
All templates and sub-templates are accessible from the CLM platform, so updating them is simple and effective.



## No-code automation

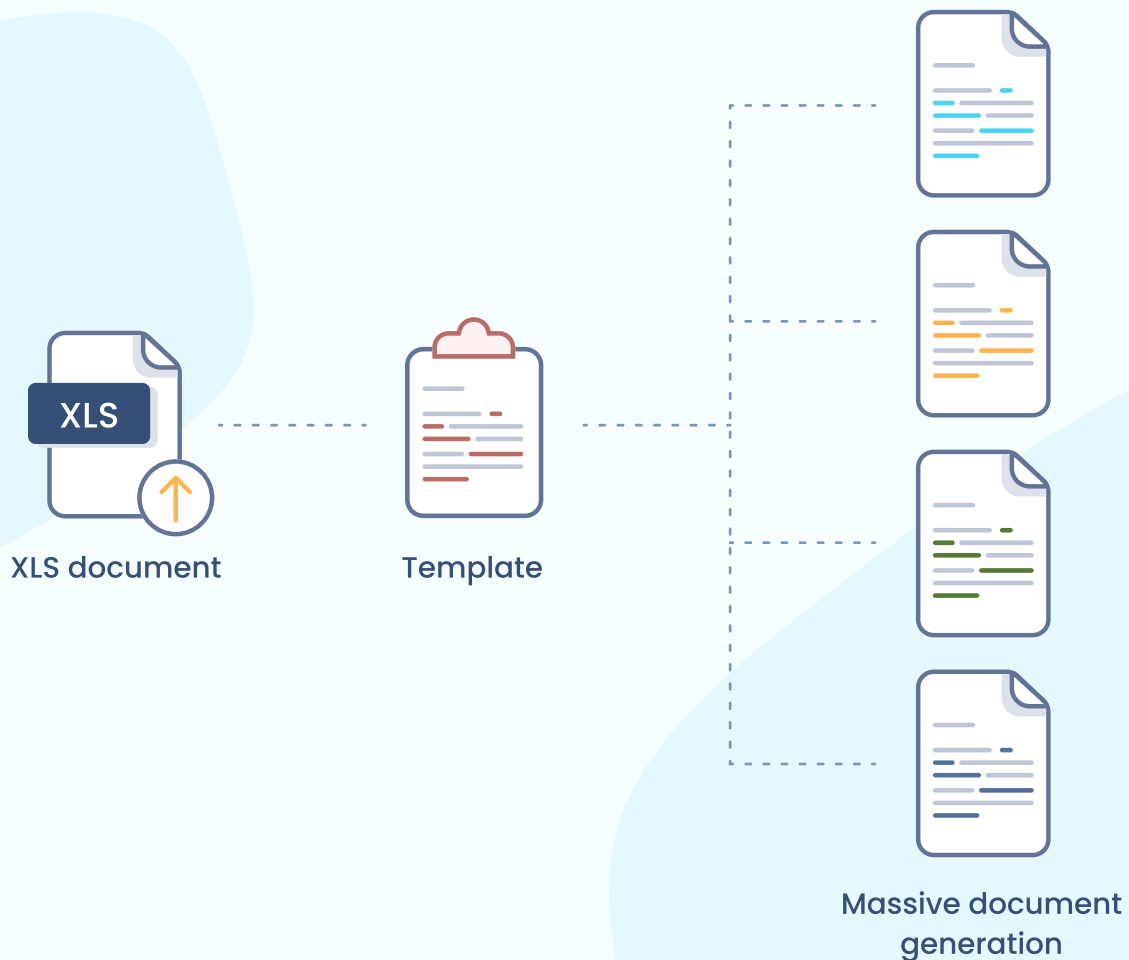
Technology must be intuitive and visual for the user experience to be optimal and effective. The most advanced CLM software features no-code automation, best suited to the user's needs for versatility and ease of use. All the power and complexity of the software are brought to users in the form of a practical and attractive application.

When choosing a CLM, usability is of paramount importance. It should include a Word text editor in the tool itself, with formatting, real-time remote working, collaborative writing, commenting and change control.



## Massive generation

If you want to create automatic flows for bulk document generation and sending to signature (or sending by certified email), **make sure you can do this using the CLM APIs or bulk upload to Excel or CSV**. You will also be able to retrieve all signed documents and store them wherever you wish.



## Integrated Word editor and role manager

Microsoft Word (.docx.) is often the preferred format for a significant part of the population. If working with this program is also a must for your company, **you should ensure that the CLM provider you choose has CLM-compatible text editor software within the tool**. If it also provides an online text editor compatible with Word, it will make a difference. As well as including collaborative writing, with control of changes and comments, it will allow your workers to maintain the usual format and style set by the company for this type of file, while they can work remotely, in real time.



## KEY BENEFITS

- ✓ Automation has no limits of scope or complexity.
- ✓ It respects each company's own format and style guide.
- ✓ It allows you to create double-column documents in several languages.
- ✓ It uses text transformations, numbers, dates and automatic calculations.
- ✓ Use clauses from the library, and adapt gender and singular or plural automatically.
- ✓ Use loops to repeat parts of the text.
- ✓ Automatically adjusts text with enumerations (e.g. optional clauses).
- ✓ Add images, annexes and attachments.
- ✓ Generate multiple documents at once with just one click.
- ✓ And much more.



# 3

## Contract Management: the evolutionary step in document management

Technology to **manage your documents from a single platform, in a secure, agile and efficient way**. Ensure compliance and maximise your company's relations with third parties.

### WHAT IS IT FOR?

Contract management is used to create, sign, distribute, manage, store and track legal documents.

Thanks to this technology, the teams reduce the time spent managing legal documentation, accelerating the company's sales.

< 19th December >

8:00 AM

- Contract renewal**  
Earnest money contract

9:00 AM

- Penalty clause**  
Earnest money contract
- Contract expiration**  
Earnest money contract

M	Tu	W	Th	F	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

## Alert system

Manage your legal documents in an agile and risk-free way: **set up alerts to monitor contractual obligations, automatic renewals, renegotiation of terms and all kinds of contractual events.** Let the software remind you of the next step in each contractual process and avoid all kinds of legal contingencies and risks associated with incorrect or disorganised management.

**The system allows you to set customised reminders and select the employees who need to be informed, so that they are notified.** View all outstanding reminders and contractual milestones from your alerts dashboard to stay on top of events in the coming weeks and organise your schedule.

## Metadata

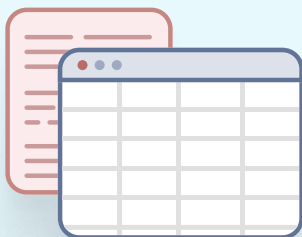
Metadata is used to classify and control documents. **In the CLM, different views are created based on the metadata of the contracts and filters are established to monitor them at a glance.**

- Customised metadata associated with documents can be manually added by users, automatically extracted from document data, or provided by the CLM.
- Structured contract data enables advanced searches and automated document management, reducing workload and minimising human error.

## Views and reports

The views offer multiple filter criteria to control the documents as you wish and display them in a fully configurable dashboard. **Keep an eye on contracts pending signature, created by the sales department or created in the last month with an amount greater than 'x' and with an automatic renewal clause, among many other options.**

The CLM allows you to extract all these customised views into an Excel file and create reports to keep track of risks, obligations and contractual renewals.



## Storage and document management

Keeping documents on the desktop is no longer trendy. Not only for practical reasons of accessibility but also because of the lack of security that this entails.

**CLM allows all documents to be stored in the cloud so that they can be consulted online from anywhere in the world.** All documents created automatically through the platform, uploaded by third parties, or in Word or PDF formats, will be available in one place.

Similarly, the CLM allows each user in the organisation to be assigned a profile within the platform, with different roles and permissions depending on the needs.

## KEY BENEFITS

- ✓ Store all your company's legal documents in a single cloud platform. Find them at the click of a button.
- ✓ Organise your documents by 100% customisable categories.
- ✓ Secure and control contractual processes without forgetting a single step.
- ✓ It facilitates interdepartmental collaboration.
- ✓ Assign profiles within the platform with different roles and permissions.
- ✓ Activate and deactivate read, write or other permissions.



# 4

## Smart workflows: scaling collaboration across teams

Your documents are an ally, not an obstacle. CLM **facilitates collaboration** and **secures** and **controls documents** while **democratising their use**.

### WHAT IS IT FOR?

CLM puts companies in control of all the documents they handle on a daily basis. These are not isolated: they affect multiple departments such as sales, human resources, legal, procurement... This is where intelligent workflows allow the collaboration process to be effective and not a burden for the team.

Intelligent workflows support in all phases of document collaboration:

1. **Interdepartmental collaboration.**
2. **Collaboration with third parties outside the company.**
3. **Contract negotiation.**
4. **Internal approval or validation.**
5. **Electronic signature.**



## Legal ticketing

The legal ticketing of a CLM is the fastest and most effective way of channelling all the requests received by a company's legal department. Requests are created via a web form, and the department is notified automatically and will be able to manage the request, using all the data entered in the form for the creation of the necessary contracts, without the need to copy and paste the information.

Thus, the CLM, thanks also to metadata and reports, allows monitoring of the status of the different requests, as well as to analyse the number and type of requests received and managed by the legal department.

## A company-wide document self-service

Fed up with the tedious routine of managing documents, correcting countless errors and missing deadlines? Tired of a constant bottleneck in the legal department? Thanks to the intelligent workflows offered by CLM, your company's users have a self-service document management system that allows them to manage contracts and any routine documents in a much more efficient way.

**Company employees can create contracts autonomously, using always up-to-date templates, validated by lawyers, that comply with the law and your corporate policies.**

In the same way, the legal department will have the control to establish who downloads these documents, in what format and under what circumstances, to prevent unauthorised changes from being made and to keep the company's most sensitive information under control, avoiding all kinds of risks in operations.



## Gather information

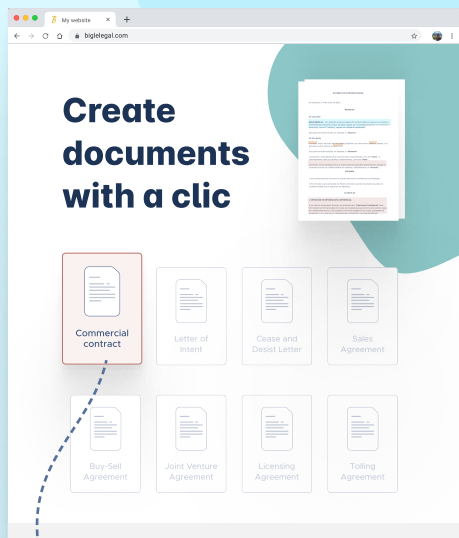
On many occasions, extra information is required to create or support a document. This may be either from within the company or from an external party, and we may require people to provide contact details or certain files such as passports, bank receipts, plans, budgets, etc.

This type of information is usually requested by email or phone call but, after the request and delivery of the requested information, there is still the manual work of storing it and copying and pasting it into the contract. Not to mention the risks associated with the process, such as unwanted loss or leakage of data and the delay in processing that this entails.

To facilitate and secure the collection of information, CLM technology allows to share forms with third parties through a link:

1. **Choose which parts of the form you want to share** and the software generates a link to disseminate it.
2. **Send the link by email automatically** or copy and paste it into the messaging service of your choice, so that the people involved can fill in their data and upload attachments conveniently.
3. **See the changes** in the form in real time.





**Commercial contract**

Name of natural person

Identification Number

Address of the entity

Place of contract

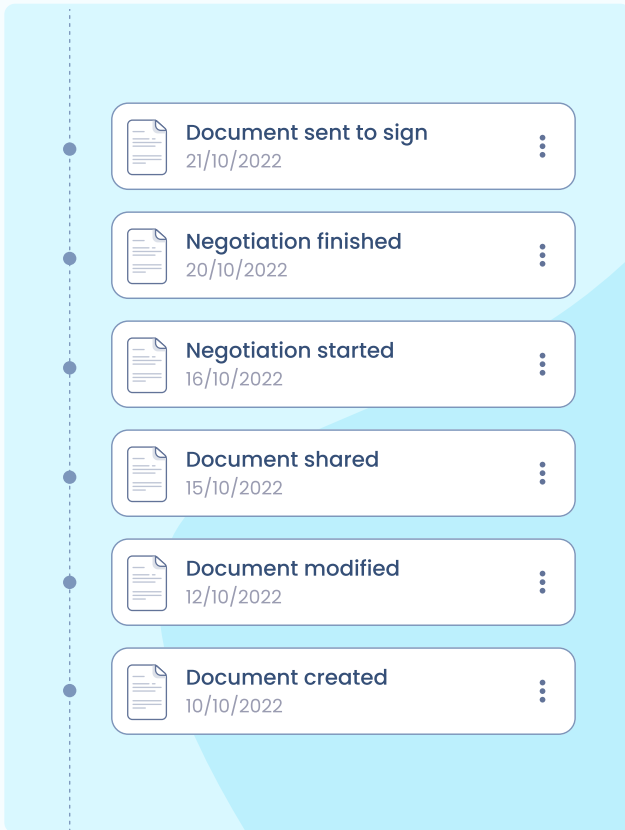
**Send document**

## Weblink

Thanks to weblink, it is possible to publish the CLM forms on a web page, so that anyone can fill them in. Once the data has been entered, the CLM platform will automatically create a document with all the data and notify the person or group responsible for managing it.

The possibilities are almost endless:

- **Automate customer enquiries:** publish an online form on a website and save time on emails and calls to collect information.
- **Create questionnaires for suppliers to upload the necessary information** to become certified, thus improving the company's purchasing processes.
- **Optimise time spent on KYCs** by allowing customers to provide their data via the company's website.
- **Provide candidates for the company's job offers with a questionnaire** to upload the necessary information for the interview and hiring process.



## Traceability

The document activity history provides complete control over the actions carried out on each document. It allows you to know, for example, who has edited the document and when, whether they have shared the form, initiated a negotiation or sent it for signature on what date and with whom.

## Copying data between documents

Copy data from one document to another to save time and minimise errors. Do you need to create a chain of documents for the same operation? **Forget about having to copy and paste the same data from one document to another, the data is copied automatically at the click of a button.**

Among other examples, this system allows for the creation of an NDA with a potential supplier: when the procurement department has validated and approved the supplier, you can transfer the data from the NDA to the Service Contract and, finally, copy it to a Data Processing Assignment contract. All in a few clicks.

### KEY BENEFITS

- ✓ Assign roles, define tasks and manage your contracts intelligently.
- ✓ Traceability: keep track of every action performed on documents.
- ✓ Copy data from one document to another with one click: saves time and minimises errors.



# 5

## Ensure centralised negotiation and validation of contracts

Negotiating and validating contracts has never been easier. **Centralise and optimise the negotiation and validation process.** Forget the headaches.

### WHAT IS IT FOR?

Once the first draft of the document is ready, with all the necessary information, the CLM technology allows contracts with third parties remotely in change control mode, all from the platform.

CLM contract negotiation enables companies to scale up their contract document generation, streamlining legal operations and securing them, to reach the next evolutionary step of contracts.

Each version of the negotiation is automatically stored in the software so that retrieving versions is a breeze.

CLM also allows internal validations of documents to be launched and recorded for future reference.





## Avoid negotiation chaos with CLM

A negotiation can be chaotic. When changes to different paragraphs, points or terms are discussed, it gets bogged down in email chains with dozens of emails. After various copies and pastes, changes and versions, doubts arise as to which is the definitive version, and even misunderstandings and confrontations arise.

CLM technology makes trading much clearer, simpler and more effective. Monitor changes in the document, manage them in an agile way and have all the versions available thanks to the version history to have control of the negotiation at all times.

## Avoid legal contingencies

The traditional contract negotiation process exposes companies to legal contingencies that can come from various sources, such as human error, breaches of confidentiality or unwanted leaks. The legal departments of companies manage flows of documents and contracts of great relevance to their business and a loss of control entails very serious risks.

**Negotiation through a CLM solution mitigates all these contingencies by ensuring processes** thanks to a negotiation module from which you collaborate with the team and the people involved in the document process.



Final document



Final document 2



Final document 2  
final version



Final document 2  
final version OK



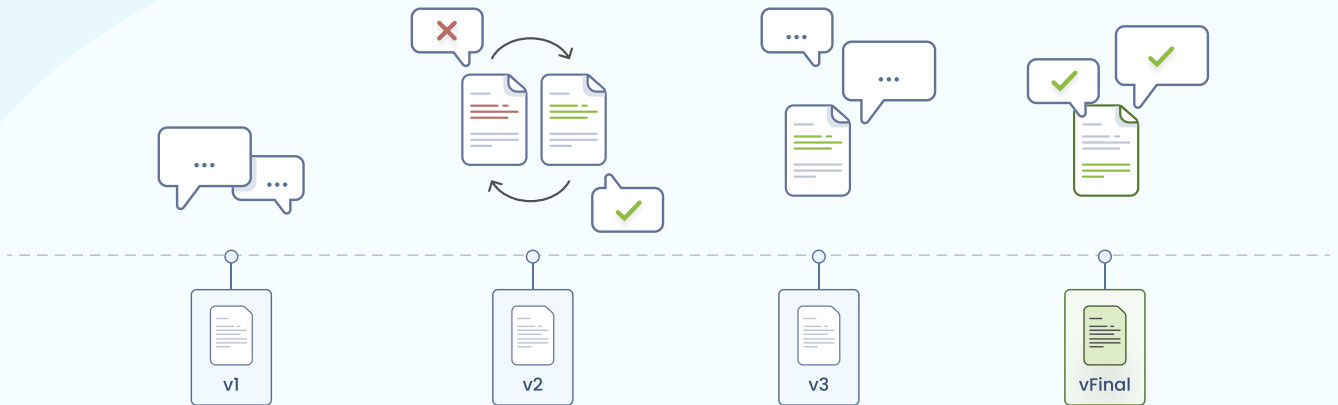
Final document 2  
final version OK 2



Final document 2  
final version OK 2  
FINAL

## A validation system according to business rules

A good CLM should allow the establishment of an internal flow of validation of documentation both to previously established responders according to the business rules themselves or to a validation pool. Likewise, it should have a task system to help users control validations: to know the status of each validation and be able to reassign validators if necessary.



### KEY BENEFITS

- ✓ Avoid endless chains of emails and multiple versions of contract files.
- ✓ Share a link with the counterpart for changes and comments.
- ✓ Track changes. Increase control, traceability and security.
- ✓ Version history. Don't miss a detail of any of the negotiation or validation steps.
- ✓ Add people to the negotiation, and internal notes that the counterpart will not see.
- ✓ Monitor ongoing validations at a glance and take action when necessary.
- ✓ Everything you add will be notified to the above-mentioned person and to all those involved in the negotiation task.

# 6

## Advanced electronic signature: the future is now

Paper is a thing of the past. The electronic signature of legal documents **allows departments to make a qualitative leap in security and speed.**

### WHAT IS IT FOR?

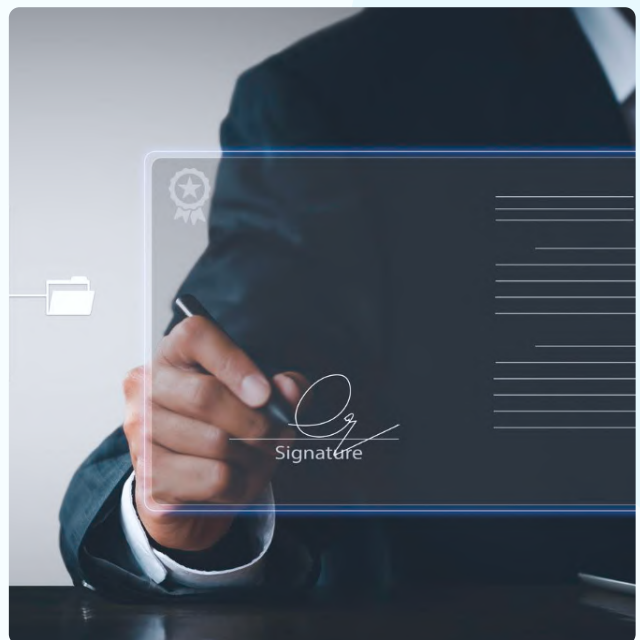
The biometric electronic signature through a CLM allows managing various contract signing processes in a controlled, secure and efficient manner. Sending documents to be signed is done in the blink of an eye, shortening times and storing the signatories' identification data thanks to biometrics - all paperless.

A CLM must cover the entire documentary process, and that implies that it offers a state-of-the-art advanced electronic signature. This functionality ensures the privacy of unique signatory data, centralises the signing process to ensure legal sign-off and provides greater security than traditional paper signatures by storing signatory data such as device pressure, stroke acceleration and signature speed.

## How does it work?

1. **Start a new signature:** upload a contract to the CLM platform.
2. **Enter the signatories' information** from the platform.
3. **Send the signature request** via email. Add a personalised message to your recipients.
4. **The recipient receives an email** with a link to review the document and complete the signature.
5. **Receive the signed document** in your email, together with the audit trail containing all the signature evidences, such as the date on which each signature step has taken place for each signatory, the device and browser used and the evidences related to the signature.

The CLM provider you choose must guarantee that its electronic signature is legally valid and complies with current regulations while using the highest security standards. Thus, it is important that the CLM guarantees that your company's or your customers' information is treated as strictly confidential, with an information security system in place to ensure this.



## KEY BENEFITS

- ✓ Stores unique data of the signatory.
- ✓ It eliminates paper and speeds up recruitment cycles.
- ✓ It generates real-time reports on the signature processes generated by the company.
- ✓ Encryption and security. Secure, encrypted information with restricted access.



# 7

## Digitise your business with the latest in integrations and customisation

The integration of CLM technology with other corporate solutions **must be easy for the company, and its adoption must be smooth and efficient.** It should be integrated with your modus operandi to optimise it, always adapting to corporate needs.

### WHAT IS IT FOR?

Technology must enhance the existing, maintain the value of equipment and get the most out of its processes. All in an intuitive and scalable way. A state-of-the-art CLM must guarantee the company effective integration, so that its employees can forget about routine tasks and

intuitively take advantage of the technology. All of this requires several key points to make the implementation of the technology a success in any company.

## Integrations

A good CLM should be easily integrated with other software tools in the company. It **must have APIs and webhooks**, so that data can be injected into the CLM via web service or retrieved and documentation generated in the same way.

A **state-of-the-art CLM must have a connector**. An innovative technology that allows CLM to be integrated with any other software or database without the need for development, all by configuration. This functionality saves companies large sums of money and time in connecting various software to each other.

## Onboarding services

The CLM should offer its clients an implementation or **onboarding service that will help companies in the process of implementing the technology** in a personalised and attentive manner for each case. Make sure that the CLM allows integration with the other technologies and applications that your company already uses on a day-to-day basis.

However intuitive the technology may be, the introduction to the software, the preparation of staff for its use - with practical sessions, for example - and **the accompaniment during the process are fundamental values when choosing a CLM**. Likewise, as with other technologies, it is advisable to analyse the satisfaction of the CLM users.

## Customised platform

CLM allows customisation not only of the working environment offered by the platform but also of the documents created and the signature processes carried out. **Integrating the platform with the company's identity, being able to customise it with the logo and adapting it to fonts and designs suitable for each client is a great plus**. The personalisation of the work environment must start from the corporate colour itself. It must feel like a technology that is integrated as one more in the day-to-day of the company.



## Tailor-made services and added value

Document automation is meant to be **intuitive and easy**. However, the present oppresses companies and sometimes makes it difficult to learn these processes. This is why having assistance in this field is very useful for teams.

A CLM offering automation services, for example, will bring added value and peace of mind to companies, which will be able to have automated documents available in record time, which is very practical, especially in the first contact with the CLM platform. It is important that this process is collaborative and that the software offers a professional, friendly and responsive team to answer any questions.

## Training and support

After the integration and elementary learning of the CLM platform, companies must have **two fundamental elements to guarantee their knowledge of the software: personalised training and a learning centre or online academy**.

Each profile working with documents is different in a company, so their training needs on the new technology will vary in each case. Practical, simple or more advanced training... Versatility is an element to look for in this regard.

Likewise, even if after these steps the platform is 100% implemented, **it is highly recommended to have technical support and follow-up service** that guarantees adequate attention to the organisation, available in the main language of the users.





## Security

Finally, as software that works with documents, these often include personal data that are of crucial strategic importance or are of a confidential nature. Whatever the reason, the CLM must guarantee maximum security to its clients.

**It is important that it complies with key security standards, such as ISO27001 or SOC2, in order to ensure the proper management of the data stored in the CLM.** Transmission and storage shall be carried out using secure encryption protocols and shall be end-to-end protected. Information security is a critical asset for companies and must remain so with all their suppliers. Get peace of mind that your documents are in the right hands.



### KEY BENEFITS

- ✓ Implement CLM technology successfully and with great satisfaction.
- ✓ Adapt new CLM processes to existing ones without dramatic changes.
- ✓ Have support to facilitate the process; constantly improve.
- ✓ Integrate various software with each other in just a few clicks and avoid customised developments.
- ✓ Ensure that your documents are protected by the highest security standards.
- ✓ Bring high added value to customers. Differentiate your company from the competition.



# About Bigle Legal

Bigle Legal is a cloud-based all-in-one Contract Lifecycle Management (CLM) software that automates the legal operations of companies, improving security and minimising the risk of legal contingencies. The platform is flexible, intuitive and provides full control over the entire document lifecycle.

The company is a pioneer in the field of no-code document automation, with a global presence, and its customers include large companies and large law firms. Bigle Legal's mission is to make Legal Operations Easy.

To learn more about Bigle Legal, visit the website: [biglelegal.com](https://biglelegal.com)

For other enquiries, please contact [communication@biglelegal.com](mailto:communication@biglelegal.com)

## By using Bigle Legal, you contribute to saving natural resources



**323 million**  
Kg of wood



**7,1 billion**  
Litres of water



**725 million**  
Kg of CO<sup>2</sup>



**47 million**  
Kg of waste