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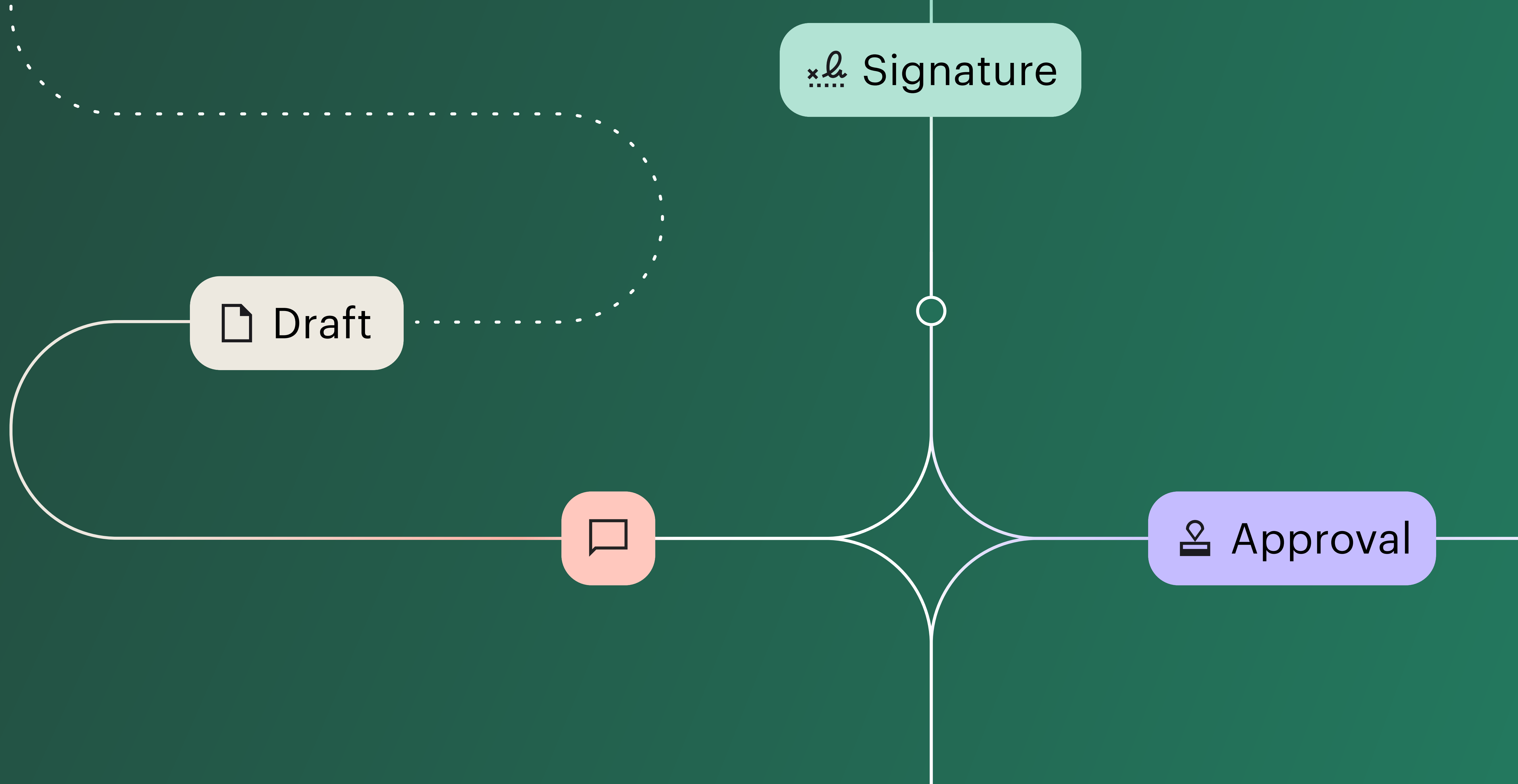
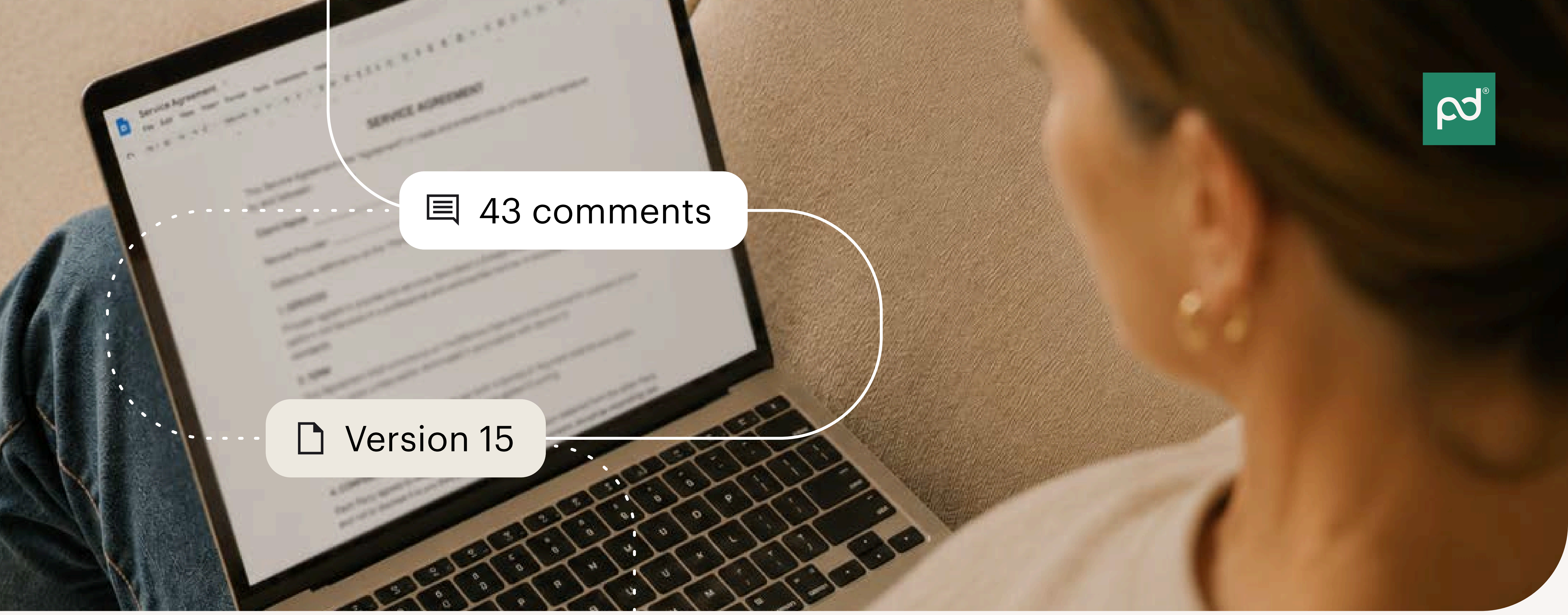
THE CONTRACT MANAGEMENT TOOLKIT

- Map how agreements move
- Pinpoint where work slows down
- Strategize what to fix first





Introduction

By the time a contract has been signed and stored, it's lived a dozen lives across different tools and teams. It's been through your legal department, stalled by the finance team, buried in revisions, and handed off more times than anyone can easily track.

When contract details are scattered like this across different systems and teams, trying to stay ahead of opportunities and commitments feels like operating in a black box.

You lack the clarity on which of these agreements actually need your attention, which are stalling revenue, and where risk is quietly piling up. And that's when your business slips into being reactive, instead of proactive.

This contract management toolkit helps you spot exactly where things in your agreement process go sideways, so your team can gain better visibility and control.

Use it to visualize your process, get a holistic view of agreement status, and identify key areas that need to be fixed today.

AGREEMENT NAME	SENT DATE	CURRENT STATUS
Service Proposal	05/06/2026	INTERNAL REVIEW
Sales Contract	12/06/2026	SENT

- Intake
- Drafting
- Internal review
- Sending

- [x] Track status, owner, and next steps in one place
- [ ] Assign ownership before moving to the next stage

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How this toolkit works

Inside, you'll find two tools designed to work together, so you can move from better understanding your agreement process to improving how your team tracks it.

The Agreement Process Map

First, use the Agreement Process Map to see how agreements move through your business, from where the process starts to which tools are involved and where ownership changes.

The Agreement Status Tracker

Then use the Agreement Status Tracker to bring scattered contract details into one unified view, making it easier to see where each agreement stands, who owns the next step, and what needs attention.

What your team should be able to find for every contract

Before you map your process or open the tracker, document and align on which contract details your team needs to find quickly and consistently. Think of it as a checklist of the information your team should be able to access without having to search through different tools and folders.

A better contract process is not just about storing files in the right place. It's about making sure the right people can quickly find the information they need to keep work moving.

Use the checklist below to identify which details are easy to find today and which ones may need better visibility.

Can your team quickly find...

Ownership and status

- [ ] Current contract owner
- [ ] Owner of the next step
- [ ] Current stage or status

Dates and timing

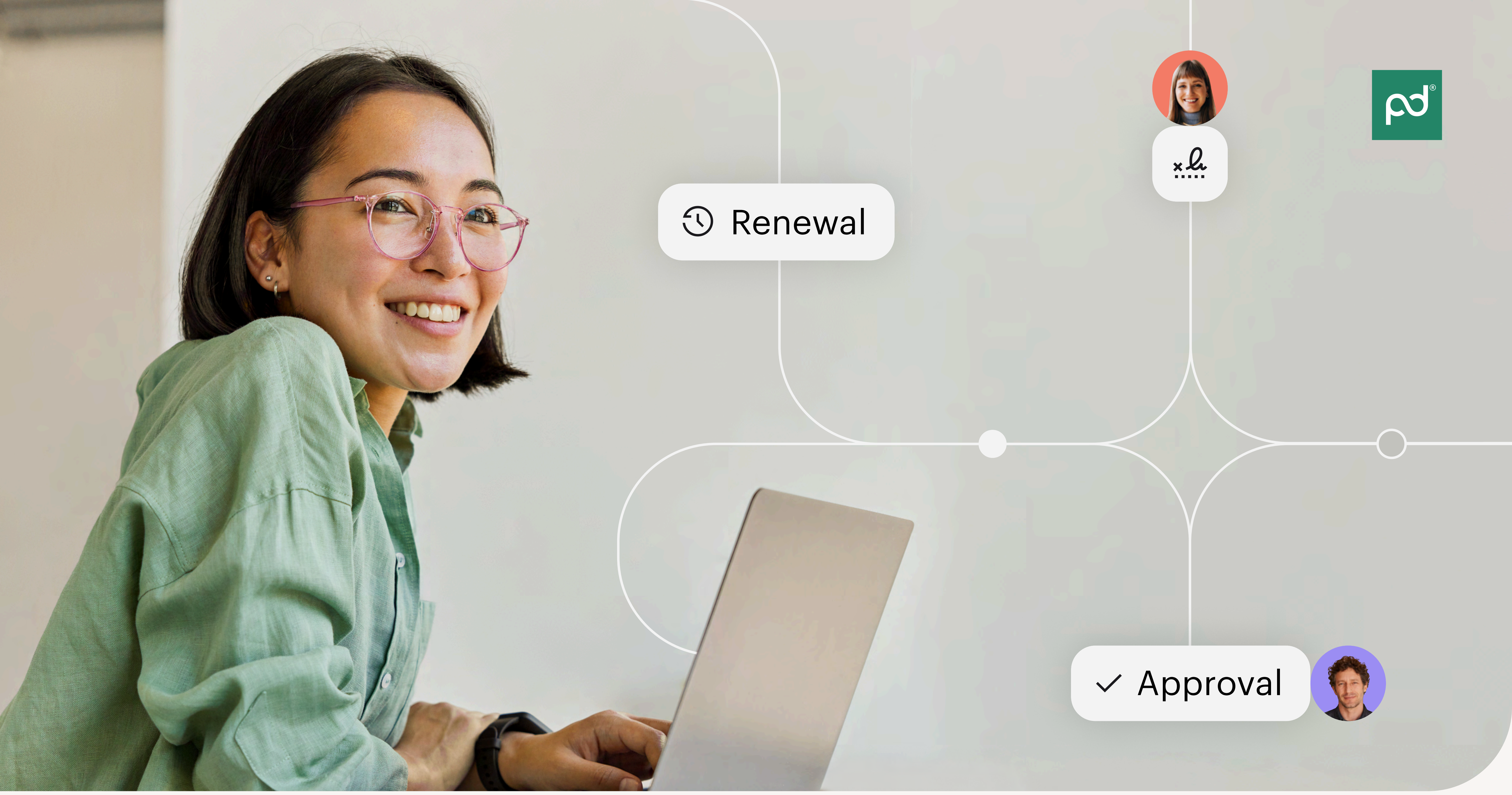
- [ ] Date the contract was sent
- [ ] Date the contract was signed
- [ ] Upcoming follow-up or renewal date

Access and storage

- [ ] Current version
- [ ] Signed version
- [ ] Reliable source link or file location

Terms and next steps

- [ ] Non-standard terms that need review
- [ ] Obligations or follow-up items
- [ ] Next action needed



The Agreement Process Map

It's hard to fix a process if you don't have the full picture of what it looks like. You may know the contract is waiting on approval or that a signed agreement is stored in a specific folder, but that's not the same as knowing each stage of the process and where bottlenecks tend to occur.

That's where The Agreement Process Map comes in. It helps you trace one contract workflow from start to finish. You'll see who gets involved, which tools carry the work forward, and where visibility gets lost. With a complete view of the entire process, it becomes much easier to see what needs fixing.

Start with one agreement type

Choose one agreement type where delays, unclear ownership, or missing details tend to show up often enough that fixing the process would make a real difference.

For example, this could be proposals that take too long to send because pricing is scattered across different systems, or vendor agreements that stall because the internal review process is inconsistent.

Start with what you already know

Before you fill out the process map, take a minute to think through how the agreement process you chose works today. You don't need perfect answers. You just need enough context to start mapping the process with a little more clarity.

Think about what usually happens first, where the work tends to slow down, and which details are often hard to find. In the next step, you'll use the process map to capture that information across each stage.

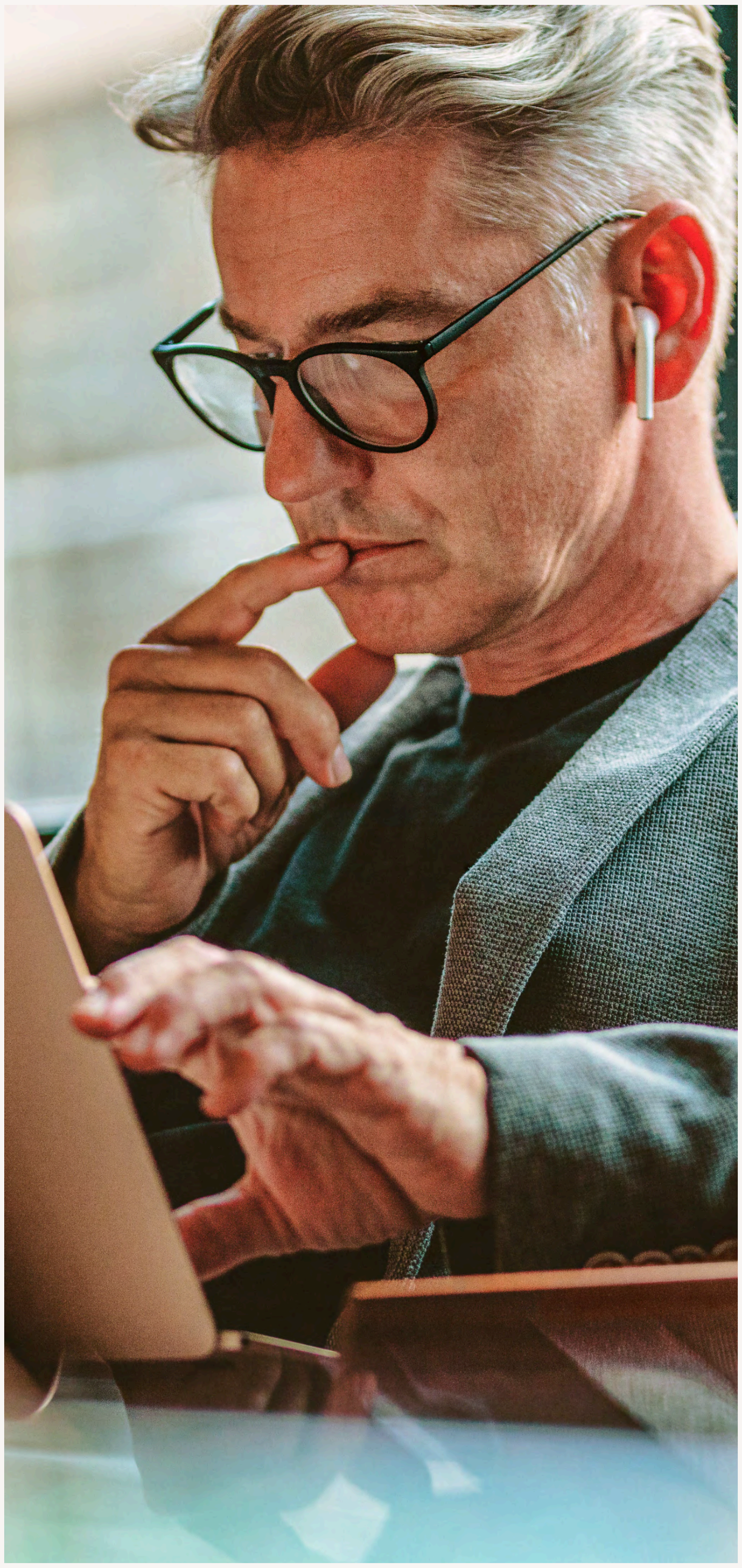
Map the workflow stage by stage

Now, map how the agreement moves through the business.

Use the six stages below as a starting point. If your workflow has multiple stages, adjust the labels to match how your team actually works.

For each stage, write the main action or decision that happens there. You can keep it short — one or two phrases are enough.

The goal is to understand how the agreement moves through your process, who the key people involved are, and where tracking becomes difficult.



STAGE 1

Intake

What happens here

Example: Sales submits a request with deal details

Owner

Tool or system

STAGE 2

Drafting

What happens here

Example: Agreement is created from a template

Owner

Tool or system

STAGE 3

Internal review and approval

What happens here

Example: Legal or Finance review terms

Owner

Tool or system

STAGE 4

Sent for external review

What happens here

Example: Agreement is sent to customer/vendor

Owner

Tool or system

STAGE 5

Signature

What happens here

Example: Final version is approved and signed by all parties

Owner

Tool or system

STAGE 6

Stored

What happens here

Example: Signed agreement is saved, and follow-up is assigned

Owner

Tool or system

Choose one fix to make first

Once your process is mapped out, look for the places where contracts become harder to track, hand off, or move forward. Pay close attention to signs like these:

- → Ownership changes, but the next owner is not clearly assigned.
- → Status lives in different places depending on the stage.
- → The same details are manually copied between tools.
- → Signed agreements are stored, but follow-up details are tracked elsewhere.
- → Team members rely on messages or meetings to know what needs action.

Which stage creates the most friction?

What is the biggest visibility gap?

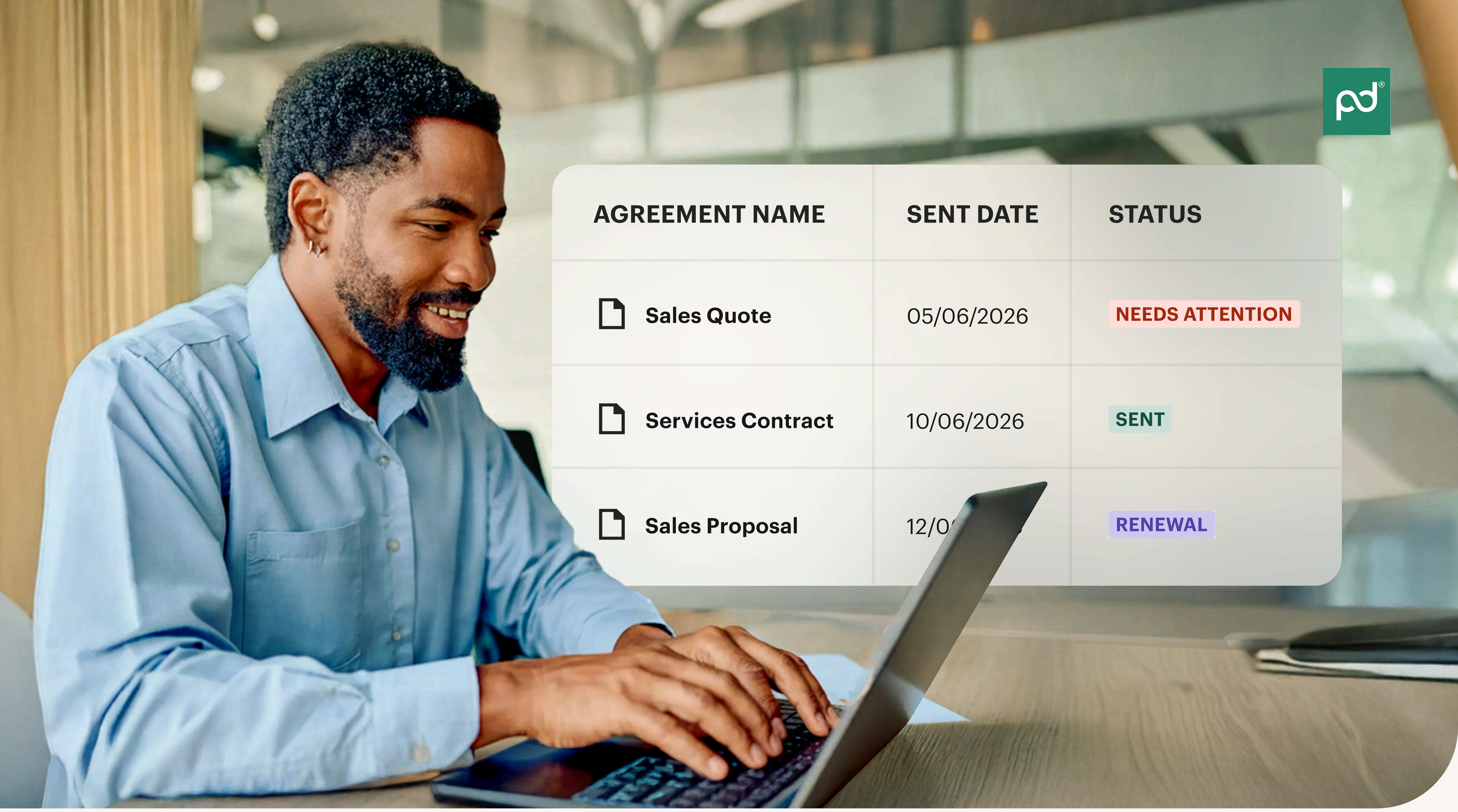
What is one process change worth making next?

From mapping the process to managing the work

Identifying the gaps in your contract process is just half the battle. The other half is knowing what your team needs to see to avoid those breakdowns as much as possible.

Your process can look clear on paper and still be hard to manage if status, owners, dates, and follow-up details are scattered across email, CRM notes, shared drives, and document tools. That's why the next step is focused on visibility.

You need a simple way to see which agreements are in progress, what's been signed, what needs attention, and what action has to happen next. The Agreement Status Tracker helps turn the gaps you found in the process map into a working view your team can use to manage contracts with more consistency and less manual follow-up.



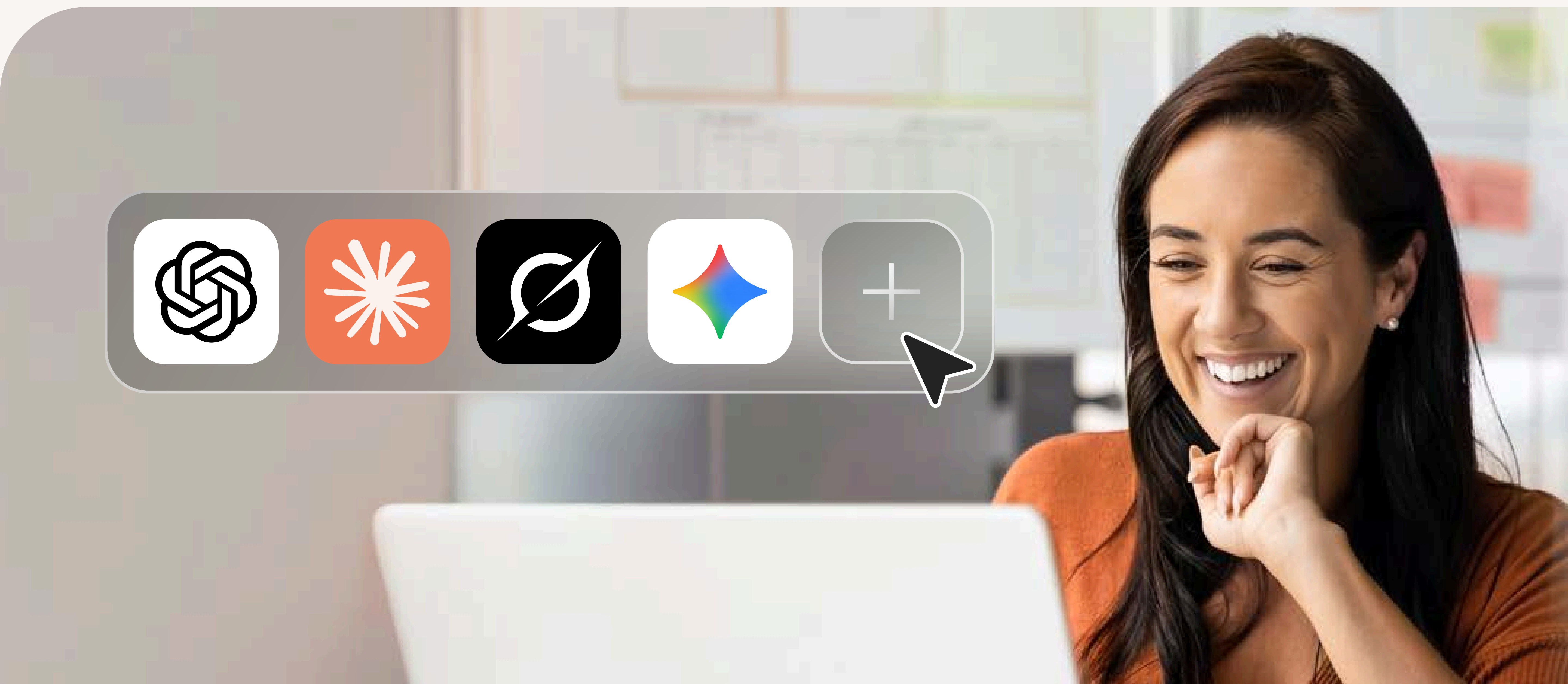
The Agreement Status Tracker

Now that you understand how an agreement moves through the business, use the Agreement Status Tracker to see all the data your team needs in one place.

The Agreement Status Tracker is a working spreadsheet that helps you track what's out, what's signed, what needs attention, and what follow-up still needs to happen. Use it to centralize the agreement details that are typically scattered across email threads, shared folders, CRM notes, e-signature tools, and individual updates.

The tracker isn't meant to replace your CRM, e-signature tool, shared drive, or document repository. Think of it as a visibility layer across the systems your team already uses, helping you see status, ownership, key dates, and next steps without tab-switching through different tools.

And the best part? This tracker is readable by the major AI tools you're already using. In our final section, we'll provide some easy, copy-and-paste prompts to pull agreement details and get the critical, at-a-glance insights you need to keep your business proactive.



Download and use the tracker

First, download and open the tracker, then — before you start filling it in — take a moment to review the fields you'll be working with.

The tracker is designed to help you answer three core questions quickly:

- What's signed?
- What's out?
- What needs attention?

Start with active agreements first. Add the details your team needs to understand status, ownership, source location, next steps, and upcoming follow-up. Some of this may be easy to fill in manually from memory or existing systems; for longer agreements, the AI prompts in the next section can help pull and organize key details before you add them to the tracker.

Keep the tracker updated as agreements move forward. Remember: The tracker only helps if it reflects what's actually happening.

DOWNLOAD THE TRACKER →

Use AI to pull the details that matter

By now, it's clear that contract details rarely live in the same place, use the same language, or make themselves easy to find. Some agreements are short and tidy. Others make you wonder if page 17 was written specifically to ruin your afternoon.

That's where the AI prompts below can help. If your first thought is, "Great, but I don't even know what to ask AI," don't worry, you're in the right place. These prompts are ready to copy and paste, so you can use them to extract the details you need *before* adding them to the tracker.

* Important note before using AI

Only use AI tools approved by your company. If your company doesn't have any approved AI tools, work from redacted excerpts instead of full agreements.

Once you have the output, treat it as a helpful first pass, not the final source of truth. Always check important dates, obligations, terms, and inconsistencies against the original agreement before adding them to your tracker or making decisions based on the results.

In the next section, you'll find optional AI prompts that can help you pull the right details from contract excerpts.

PROMPT 1

PULL TRACKER FIELDS FROM THIS AGREEMENT

USE THIS WHEN: You want to populate the tracker with a redacted agreement excerpt or relevant contract sections.

PROMPT EXAMPLE

Review the contract excerpt below and pull out the details needed for an agreement status tracker. Use only the information provided. If a detail is not included, write "Not found."

- Return the results in this format:
- Agreement name:
- Agreement type:
- Counterparty:
- Current status:
- Owner:
- Team:
- Key date or follow-up date:
- Attention flag:
- Next action:
- Source section or clause:
- Notes:

Contract excerpt: [Paste redacted excerpt here]

PROMPT 2

FLAG INCONSISTENCIES AND OBLIGATIONS THAT NEED ATTENTION

USE THIS WHEN: You want help identifying details that may require follow-up before adding the agreement data to the tracker.

PROMPT EXAMPLE

Review the contract excerpt below and identify any details that may require the team's attention. Focus on dates, obligations, non-standard terms, inconsistencies, missing information, or follow-up items.

For each item, provide

- What needs attention
- Why it may matter
- Who may need to review it
- Suggested next action
- Source section or clause

Use only the information provided. Do not make assumptions.
If something is unclear, flag it for human review.

Contract excerpt: [Paste redacted excerpt here]

PROMPT 3

TURN THIS EXCERPT INTO A NEXT-ACTION SUMMARY

USE THIS WHEN: You need a brief summary of what should happen next.

PROMPT EXAMPLE

Review the contract excerpt below and create a next-action summary for the team.

Include:

- Current status based on the excerpt
- Most important follow-up item
- Suggested owner or team, if clear from the excerpt
- Suggested follow-up date, if available
- Any missing information that should be confirmed

Keep the summary short and action-oriented. Use only the information provided and flag anything that needs human review.

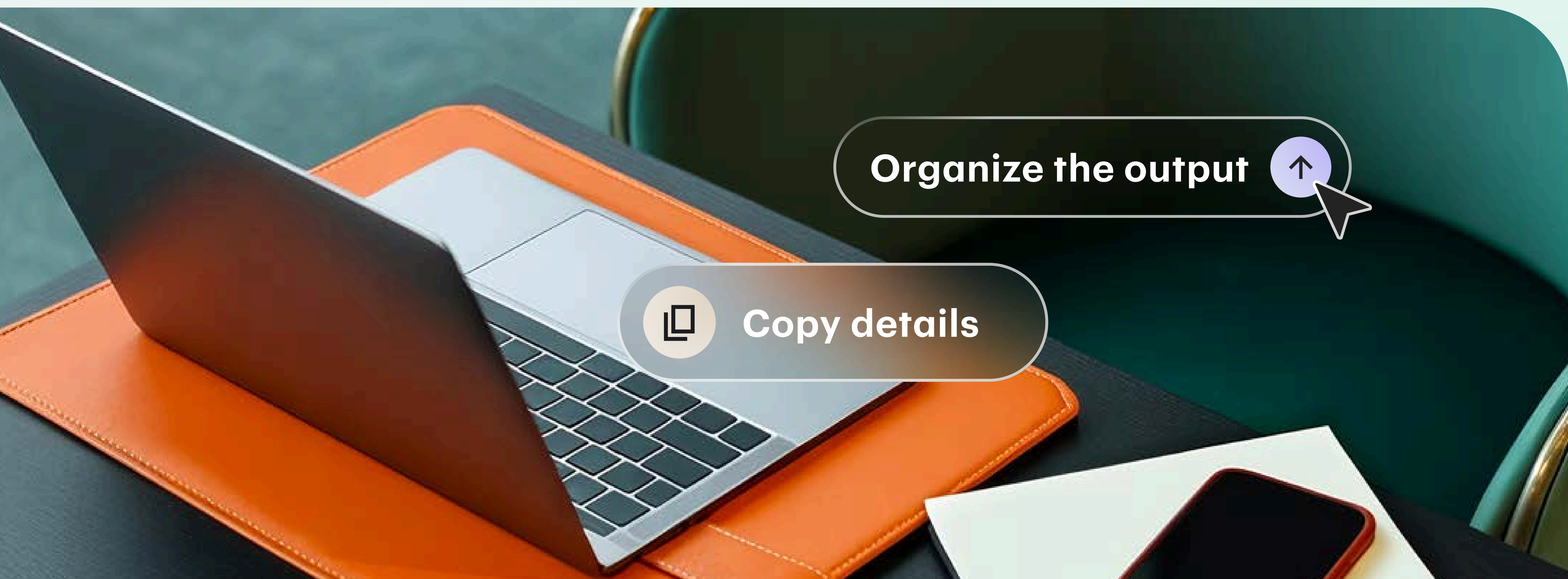
Contract excerpt:
[Paste redacted excerpt here]

Want to reduce manual entry?

You don’t have to enter every detail into the tracker manually. After using the AI prompts to pull key information from an agreement, use your AI tool to organize the output in the same format as the tracker.

That way, you can review the extracted details and copy them into the sheet with less manual cleanup.

Just make sure to verify dates, obligations, ownership, and status against the source agreement before relying on the output.



Review what needs action first

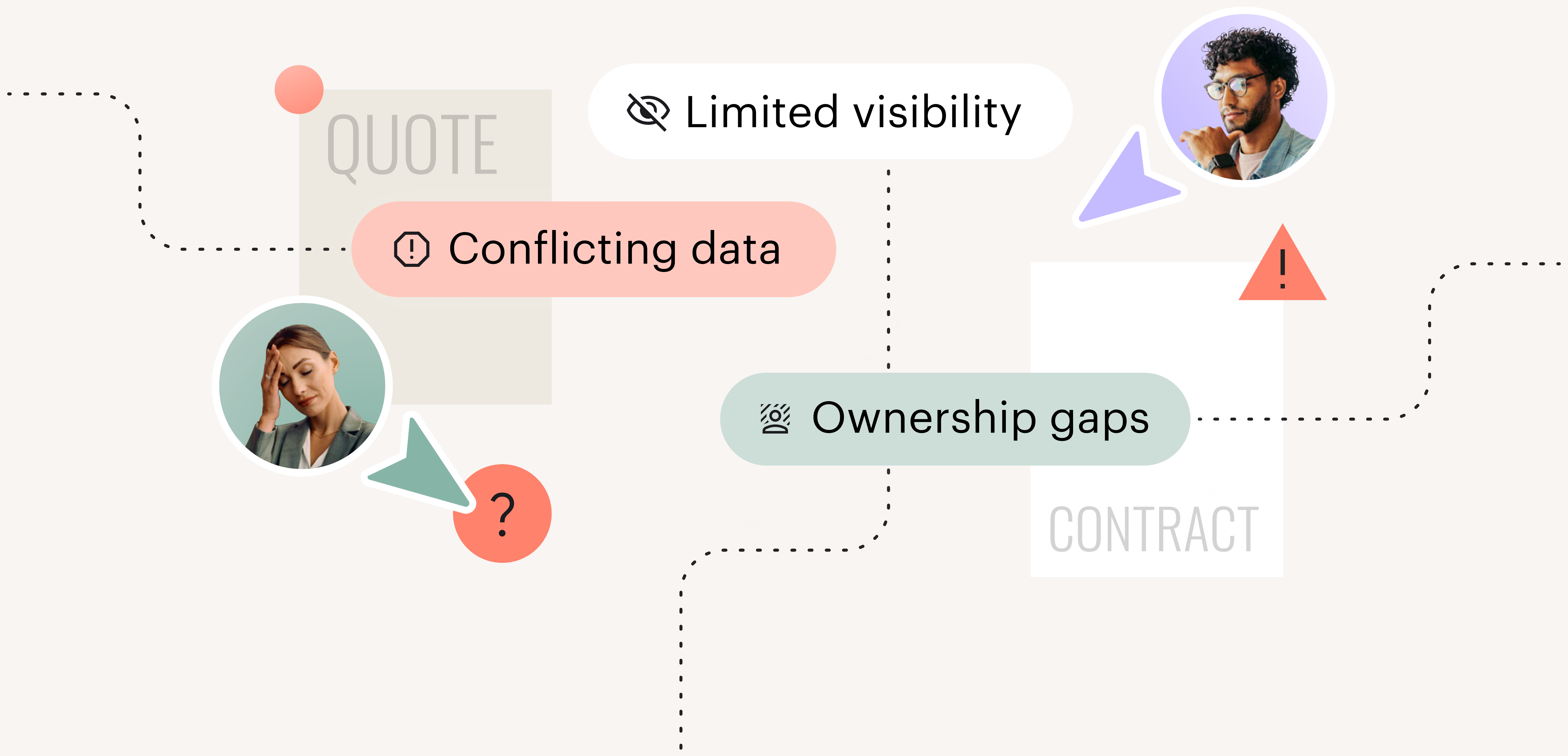
Once you've added a few agreements to the tracker, prioritize the rows that need attention first.

IF YOU SEE THIS	DO THIS NEXT
At risk	Review the source of the risk, assign an owner, and define the next action.
Follow-up needed	Assign a clear owner and follow-up date so the item does not stay unresolved.
Renewal or notice date coming up	Confirm the timing, check what needs to happen next, and make sure the right owner is assigned.
Non-standard terms	Flag the agreement for closer review and document the exception clearly.
Upcoming renewal /Notice date with no next action	Prioritize it and assign the next step before the deadline gets closer.
Outdated last updated field	Confirm the row still reflects the latest status before relying on it.

What your results may be telling you

After you complete the process map and review your agreements in the tracker, look for patterns to identify where problems keep recurring.

A one-off delay might just be a bad Tuesday. But when the same issue keeps appearing in your process map and tracker, it's usually a sign that specific steps need closer inspection.



Use the table below to connect what you found to the source of the issue, whether the problem is too many handoffs, limited visibility, unclear ownership, or repeat follow-up work.

IF YOU'RE SEEING THIS...	IT LIKELY POINTS TO...	FIRST MOVE TO MAKE
Agreements move between too many people, teams, or tools before they're complete.	Handoff complexity	Reduce or clarify the handoff points that create the most delay.
Teams can't quickly see what's out, what's signed, or what needs attention.	Limited visibility	Use one tracker to capture status, owner, next action, follow-up date, and agreement source link.
Agreements are waiting on someone, but it's unclear who owns the next step.	Ownership gaps	Assign a clear owner before each agreement moves to the next stage.
The same flags keep appearing, such as Follow-up needed, At risk, Stalled, or Renewal coming up.	Recurring process issue	Find the most common reason agreements need attention and fix that repeated issue first.

Your first improvement plan

Once you know where the process is getting stuck, you can choose the first fix most likely to have the biggest impact.

Key takeaways

The biggest visibility gap we found is

The stage where work gets hardest to track is

The agreement details we need in one place are

What will you fix first?

Select one improvement that would make the process easier to manage.

Examples:

- Create one place to check agreement status
- Assign an owner before each handoff
- Add follow-up dates to active agreements
- Standardize where signed agreements are stored
- Track what needs attention after signature
- Review stalled agreements weekly

Our first fix will be

Owner

Timeline

How we'll know it's working

Keep building from here

Mapping one agreement flow gives you a clearer starting place. But the same issues you found in one workflow can show up across the broader contract process: unclear ownership, scattered details, slow approvals, missed follow-up, or agreements that are hard to track once they're signed.

To better understand those issues, read **Contract management challenges: 6 common issues and how to solve them**. It breaks down the common problems that make contracts harder to organize, approve, track, and act on as a business grows.

READ THE BLOG →

JUNE 3, 2026

1 PM ET | 10 AM PT

If you want to work through your process with more guidance, access **The Contract Management Workshop**. With guidance from our team, you'll map your contract flow, surface the details your team needs in one place, and leave with a clearer plan for what to improve next.

REGISTER FOR THE WORKSHOP →

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