



Use Case: Contract Lifecycle Management System (CLMS)

UCN601_0001

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1. Preparation

1.1. Outcome

Keep track of your contractual documents and trigger required actions on time. Be able to retrieve all your contracts either active (including contract templates and contract drafts) or inactive (archived) with a variety of search options. Analyze all documents within your contract database with detailed queries. Easily renew your expiring contracts and meet existing deadlines.

Create new contracts from contract templates out of your template library, link them to existing master agreements, forward them to colleagues and make sure the necessary contents are included and approvals granted.

1.2. Characters

Name	User Role/ Personal	Login ID	Password
Buyer	Procurement Contract Manager	Buyer	
Counsel	Contract Reviewer (Legal Perspective)	Counsel	
Chief Procurement Officer	Contract Reviewer (Professional Perspective)	CPO	

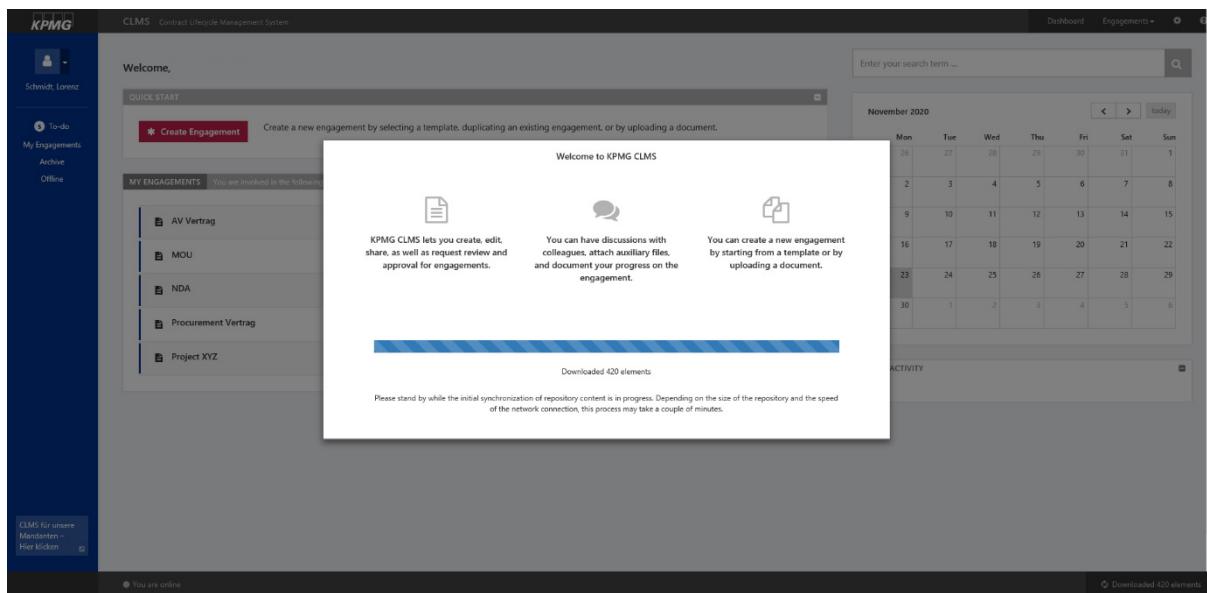
1.3. Products and Platform Features

List each of the products and platform features highlighted in the narrative.

Name	Description	Documentation or Video	SKU
CLMS	Contract Lifecycle Management System (CLMS)		
Demo Video	Template Management with CLMS	http://www.kpmg.de/clms-vorlagenverwaltung	
Demo Video	Contract Creation with CLMS	http://www.kpmg.de/clms-vertragserstellung	
Demo Video	Contract Administration with CLMS	http://www.kpmg.de/clms-vertragsverwaltung	

1.4. Steps before delivering a CLMS Demo

Before we get started, let's wait until the system is initialized.



2. Use Case: CLMS

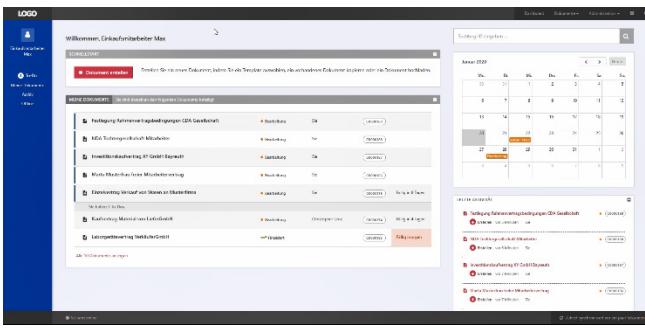
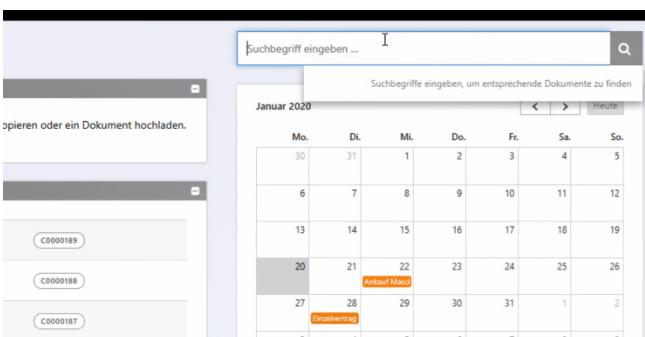
Use case description:

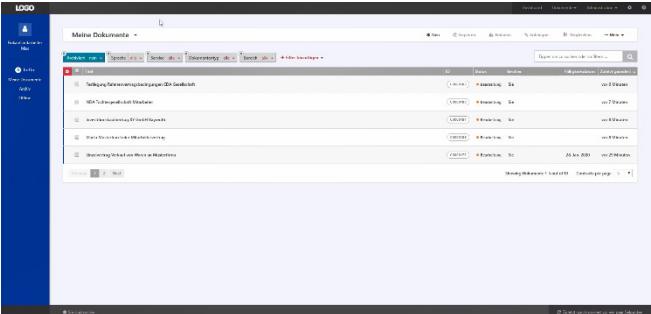
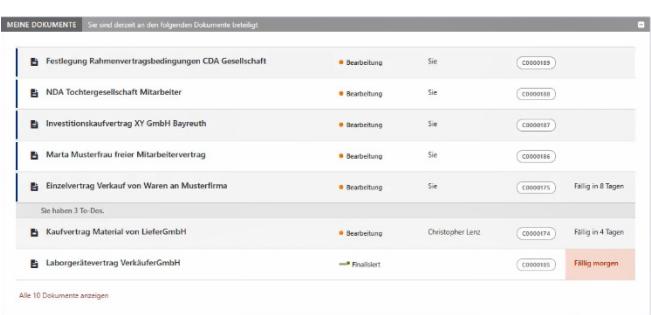
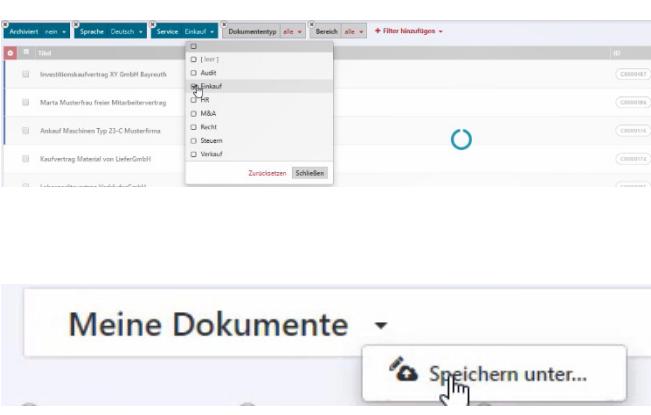
The respective buyer wants to get an overview over all procurement contracts which are about to expire within the next year. He wants to renew a specific agreement, which is mainly identical with the previous one except for the fact that one clause of the template - the contract is based on - was altered by the responsible admin and therefore needs to be replaced.

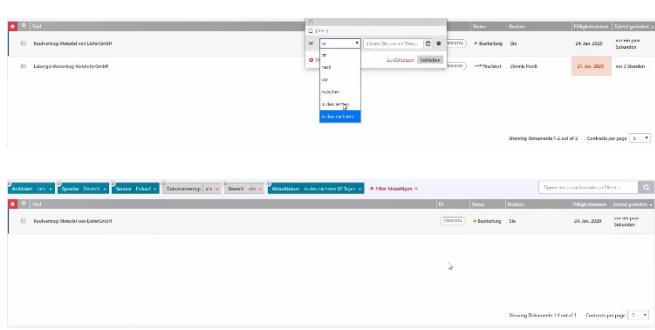
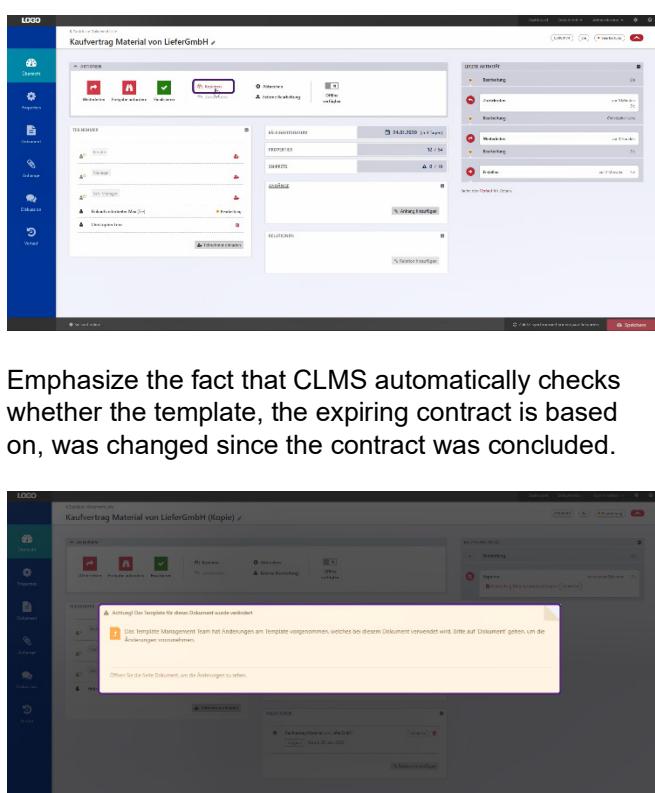
Let's start with explaining some basic functionalities and afterwards have a look at how the buyer is able to find relevant contracts and how creating a renewal draft for an expiring contract is handled.

Persona: Buyer – Procurement Contract Manager

Demonstration Steps:

Frame	Narrative	Instructions
Central User Dashboard	<p>The user dashboard is the landing page of CLMS, including all the documents the user is currently involved in as well as a calendar with assigned due dates and a list of recent activities. The dashboard can also be customized.</p> 	Give an overview over the different areas and functionalities of the user dashboard.
Explaining search capabilities	<p>Demonstrate the search capabilities (including templates, contract content, etc.)</p> 	Click in the search-bar and type in some search terms.

	<p>Demonstrate the detailed view “<i>my Documents</i>”, describe the structure of the view. Note: The different columns displayed in the table are the content fields within all contracts. Each row represents a contractual document and its individual contents for the respective (column) fields.</p> 	
<p>Explaining “My Documents” view</p>	<p>Demonstrate the customization options of the view. (Add new columns)</p>  <p>Demonstrate the filtering option of the table (e.g. by selecting values for existing filters or by adding additional filters)</p> 	<p>Click on the red button with the white gear on the top left corner of the table and add some columns.</p>
<p>Define a new query and save it as a favourite</p>	<p>Use the different filters, to retrieve a list of contracts you are interested in and save this query as a favourite.</p> 	<p>Choose exemplary filter options.</p> <p>Click on the arrow next to my “documents” and then on “save as” to save the query as a favorite after naming it accordingly.</p>

	<p>Show how the result of a query can be exported</p> 	Click on “...More” in the column containing the name of your query and select “export to excel”
Create a query for Deadline Management	<p>Add the Filter “Due Date” to the previous query for retrieving the contracts within a certain due date.</p> 	Choose your previously saved query. Add the filter “due date” Set the filter for “within the next”, type “365” and select “days”. Discuss the results.
Creating a renewal draft for an expiring contract	<p>Use the query above to retrieve a contract which is about to expire and create a renewal draft.</p> 	Select the contract which was retrieved by the query. Click on “Copy” within the “Actions” box.

Use case description:

The respective buyer wants to create a new procurement contract which will be part of an existing master agreement and should be based on an existing template from the template library. Corresponding Metadata is already available within the SAP CRM Module and should be imported. After drafting the document, another colleague (counsel) will be involved. In the end, the CPO needs to review and sign off the draft.

Persona:

Buyer – Procurement Contract Manager

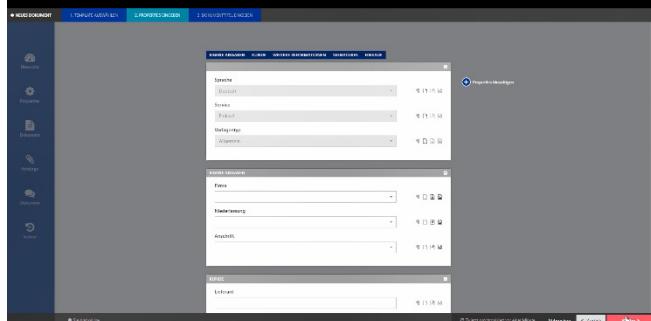
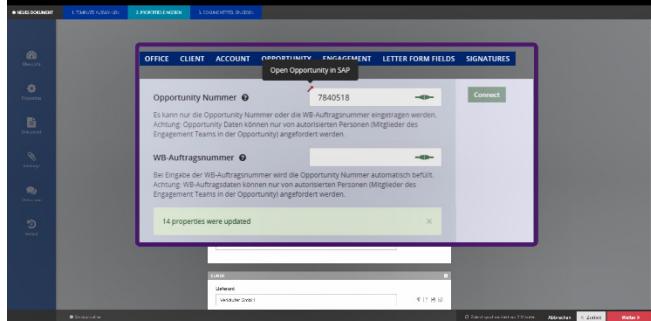
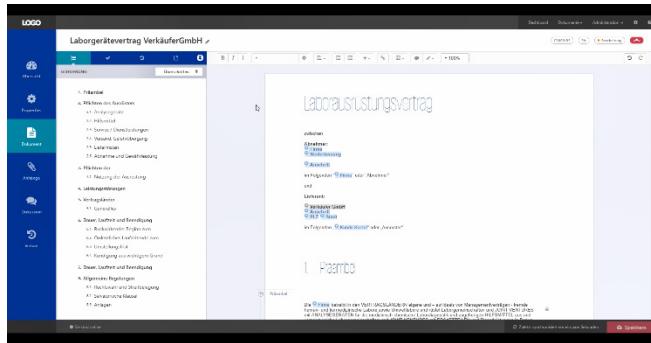
Counsel – Contract Reviewer (Legal Perspective)

Chief Procurement Officer – Contract Reviewer (Professional Perspective)

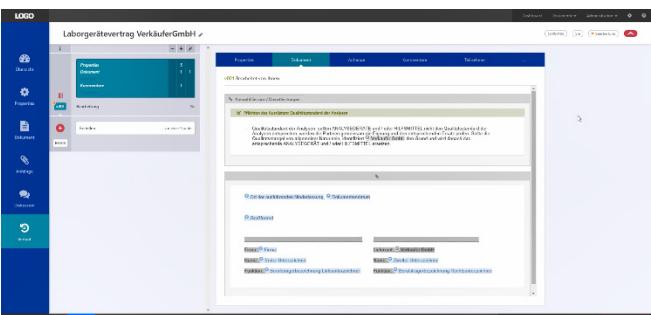
Demonstration Steps:

Frame	Narrative	Instructions
Start the creation process	<p>The creation process starts within the user dashboard. The creation of a new contract can either start with choosing a template, duplicate an existing document, uploading a file or creating a blank document.</p>	Click on the red " <i>Create Document</i> " Button.
Finding the right template	<p>In this case the buyer wants to create the new procurement contract based on a template from the template library.</p> <p>To be able to find the most suitable contract template, full-text search and (or) options to filter the results are available.</p>	Select "Choose Template" in the following dialogue. Use the full text search in combination with the filter

	<p>Templates which are used frequently can also be marked as favorites.</p>	<p>options to find the template.</p> <p>Click on the template within the left box and optionally mark it as a favorite.</p>
Enter/Import Metadata	<p>The metadata is either directly integrated into the contractual document or serves for administration or reporting purposes. Depending on the entered metadata (e.g. Volume) subsequent workflows can be automatically triggered.</p>	<p>Move to the next step by clicking on the red "Next" button on the bottom.</p>

	 <p>Metadata can also be imported from other systems via interface (e.g. SAP)</p> 	Fill in exemplary metadata for the contract.
Editing the contract draft	<p>Use the integrated rich text editor to edit the contract draft. Easy navigation is guaranteed through the table of contents on the left-hand side. Comments, tables, enumerations etc. can be easily added.</p> 	Click on “Document” in the menu bar on the right-hand side of the screen. Exemplary edit the contract draft.

<p>Link the contract to an existing Agreement</p>		<p>Click on the “Overview” button in the menu bar on the left-hand side of the screen. Add a new relation with the respective master agreement.</p>
<p>Forward the draft to the contract reviewer (e.g. counsel)</p>		<p>Click on “Forward” within the “Actions” Box and choose an employee (e.g. counsel).</p>
<p>Document finalization (CPO approval)</p>		<p>To be able to finalize the document, the system will check several prerequisites concerning the content of the draft but also (depending on the workflow) the approval of e.g. the CPO.</p> <p>Click on the Green Button “Finalize” to get an overview over the steps which are missing before the contract can be finalized. E.g. CPO approval (depending on the workflow)</p>
<p>Contract Review (Professional Perspective)</p>		<p>There are different options for conducting a review, either by looking at the current state of the contract...</p> <p>Log into the CPO Account.</p> <p>Click on the contract to be reviewed within the box “my documents”.</p> <p>Review the content by clicking on the “document” button in the menu bar on the left-hand side of the screen.</p>

	<p>... or by checking changes through the history function.</p>  A screenshot of a computer screen displaying a software application titled "Labogerätevertrag VerkäuferGmbH". The interface includes a left sidebar with icons for Home, Properties, Documents, and History. The main area shows a document with several sections and a "History" button. A modal window titled "History des Dokuments" is open, showing a list of changes made to the document, including additions and deletions of text and images. The modal has a "Close" button at the bottom right.	<p>Review all changes of the document by clicking on the "History" button in the menu bar on the left-hand side of the screen.</p>
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