RFP Questions for Assessing CMS Adoption

Prepared for:
Legal Operations professionals

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Introduction

At Ironclad, our mission is to empower legal teams to do business-critical work for their enterprises. Technology is key to this—but only if it's being used. Technology that is hard to use and learn, difficult to deploy, and siloed from business processes will not be adopted, and will therefore be useless no matter how many bells and whistles it comes with.

This RFP template was written with exactly this problem in mind: how do legal teams assess contracts management software for enterprise-wide adoption?

If you're reading this document, congratulations—you're already ahead of the game! That's because the key to getting adoption right is thinking about it as part of the vendor selection process. Rather than just evaluating vendors on technology, capabilities, and pricing, it's important to bake in adoption criteria from the start.

This RFP Template does this for you, baking questions geared at assessing adoption into every section of the RFP. The questions around technology, for example, test whether or not a vendor's technology includes features that are commonly required by business users, such as integrations and intuitive design. Questions around deployment team aim to ensure that your deployment team has a method for adoption and testing that will succeed in your unique business ecosystem.

Every business has unique needs and processes, so you should customize this RFP Template to yours. If you're not participating in a competitive vendor selection process, you can use the questions in this template to frame your discussions with vendors.

We are always looking to improve our materials for legal operations professionals. Let us know if you have feedback or comments at hello@ironcladapp.com.

Company Information

No.	Requirement	Response
1.	What is your company's name?	
2.	What is your mission statement?	
3.	Who is the typical buyer of your software within a company?	
4.	Describe the composition of your company.	
5.	Briefly describe your Board members' backgrounds.	
6.	Describe the minimum qualifications (e.g., education, prior experience, accomplishments) for members of your software engineering team.	
7.	What percentage of your engineering team are women?	
8.	What percentage of your software engineering team is based full-time in San Francisco?	
9.	What are the minimum qualifications (e.g., education, prior experience, accomplishments) for account managers and customer success professionals?	
10.	How often does your team perform on-site visits?	
11.	Please provide some recent customer testimonials.	

Solution Summary

No.	Requirement	Response
12.	What are the top 3 goals your product is designed to deliver for customers?	
13.	Provide some examples of common use cases for your product that are currently in production.	
14.	List all of your product's out-of-the-box integrations.	
15.	Who are typical users of the product?	

No.	Requirement	Response
16.	Can your system accommodate multiple workflows in different languages? Please explain how.	

Design and Ease of Use

No.	Requirement	Response
17.	Describe your company's approach to product design.	
18.	Describe your company's approach to product development and testing.	
19.	How many training sessions are typically needed for users to learn how to use your product?	
20.	How quickly after roll-out does it take for users to begin using your product?	
21.	Please provide screenshots of: (a) Workflow screen (b) Approvals screen (c) Repository screen	

Contract Workflow Capabilities

No.	Requirement	Response
Workflow Engine		
22.	Can your workflow engine process any type of contract? Explain.	
23.	How configurable is your workflow engine to the diverse organizational needs? Provide specific examples.	
24.	Describe features of your product that were specifically designed to enable cross-functional collaboration on contracts.	
25.	What features enable cross-functional teams to maintain concurrent visibility on contract activities?	
26.	Provide an example of how a contract playbook has been coded into your software.	
27.	How does your product automate requests for legal work?	

No.	Requirement	Response
28.	Can your system accommodate multiple workflows in different languages? Please explain how.	
Third-party Paper		
29.	Do you have a use case for third-party contracts coming inbound? Please describe how business users and legal team users use the inbound use case.	
30.	Can your product upload third-party paper? Describe the user experience.	
31.	Does your product dynamically assign approvers for inbound contracts? If so, please describe the user experience and provide screenshots.	
32.	Describe the user experience for storing third-party paper.	
Negotiation		
33.	Can your product create redlines in the application? Please explain and provide screenshots.	
34.	How does your product track redlines, term changes, and comments?	
35.	How does your product track contract versions?	
36.	Can your product automatically import and reconcile revisions made using MS Word?	
37.	Does your system allow for fallback language to be inserted after redlines have already been provided? Please explain and provide screenshots.	
Counterparty Experience		
38.	Does your product ever require counterparties to view or log into your system interface?	
Approvals and Notifications		
39.	Does your product dynamically assign approvers based on answers provided at the start of the workflow? If so, please describe the user experience and provide screenshots.	

No.	Requirement	Response
40.	Does your product automatically collect approvals on behalf of Legal?	
41.	Can your product manage sequential and parallel approvals?	
42.	Can your product automatically launch separate workflows to capture information and processes in other departments?	
43.	Does the system allow for contracts to be approved via email? Please explain.	
44.	Can notifications be sent/received via email?	
45.	Are notifications configurable on all contract events, actions, and commitments? Please explain.	
Electronic Signature		
46.	Can signature requests be sent out directly from your product?	
47.	Can you place signature blocks on third-party paper? If so, can these blocks be customized?	

Search and Repository

No.	Requirement	Response
48.	Can the solution be configured to collect any type of contract metadata for search and discovery?	
49.	Does the solution provide narrowing filtering and search capabilities?	
50.	Does the solution provide metadata search functionality?	
51.	Can your system store final documents in multiple locations (for ex., on both Salesforce and Dropbox)?	
52.	Does your system version files natively in a cloud storage service?	
53.	Does your system programmatically name files according to a given scheme?	

Integrations

No.	Requirement	Response
54.	Does your product integrate with [insert your e-signature provider]?	
55.	Does your product integrate with [insert your storage provider]?	
56.	Can your product launch workflows from Salesforce?	
57.	Can customers control what metadata about a contract gets uploaded to Salesforce?	
58.	Can customers decide, on contract-type by contract-type basis, whether a contract PDF is itself uploaded, or if only some of the metadata is uploaded?	
59.	Does your product support SSO via Google Authentication?	
60.	Does your product have a public API?	
61.	Does the product provide the transfer of data via a secure transfer method (e.g., secure FTP, HTTPS, etc.)?	

Security

No.	Requirement	Response
62.	Is your company audited by a third party on a periodic basis?	
63.	Have you been audited for SOC 2 compliance? Please provide the audit.	
64.	Do you have regular third-party penetration testing of your applications? Please provide copies of relevant reports.	
65.	Do you have procedures in place to ensure that your information systems comply with relevant statutory, regulatory, and contractual security requirements?	
66.	Are security roles and responsibilities of employees defined and documented in accordance with your company's information security policy?	

No.	Requirement	Response
67.	Do you have an incident response procedure?	
68.	Are your policies reviewed/tested/updated on at least an annual basis?	

New Releases

No.	Requirement	Response
69.	How often do you deploy new releases?	
70.	How are releases tested?	
71.	Are new releases included in the price?	

Team & Implementation

No.	Requirement	Response
72.	On average, how long does it take to implement a workflow?	
73.	How soon after signing of a contract can implementation begin?	
74.	Please provide an anonymized project plan you've used with a customer in the past year.	
75.	Can workflows be added on an ongoing basis? Explain how.	
76.	Who will be assigned to the deployment? Please provide descriptions of their backgrounds.	
77.	How does the deployment team approach roll-out and adoption?	
78.	What is the deployment team's training plan?	
79.	How will business users be trained on the platform?	
80.	How much implementation will be done by an outside vendor?	