



SAMPLE READINESS REPORT • CLM READINESS PARTNER PROGRAM

Enterprise CLM with Workflow Automation Required

An illustrative TrailBlazer Governance Accelerator™ (Contract edition) run for an Energy & Utilities organization. This is what we find before we get a prospect ready: the scores, the gaps, and the hidden implementation scope that stalls CLM deals.

1,800 Active contracts [Reported]	730 Inactive contracts in migration scope	Tier 4 Readiness verdict Enterprise CLM	22 Gaps mapped to the Playbook (4 High)
--	--	--	--

The verdict

Volume, complexity, departmental scope, and maturity gaps have passed the point where shared drives, spreadsheets, and email can keep up. The organization warrants a CLM platform. It also reported a prior contract-technology rollout that did not reach adoption: last time the technology worked and the rollout did not. Adoption must therefore be the design priority for whichever platform it selects.

Why this prospect stalls without readiness work

What the buyer cannot yet answer	What it does to the deal
Where are all our contracts? Contracts sit in five (5) locations with no designated system of record, and documents have been lost.	Migration cannot be scoped or priced, so the SOW cannot be signed.
What are we configuring? Nine (9) contract types, but templates, value lists, and counterparty records are incomplete.	Configuration design stalls in workshops, and time-to-value slips.
Who owns go-live? A prior rollout failed at adoption, and Change Management scores 2.9 (Reactive).	The executive sponsor hesitates to commit a second time.

The prospect's value at stake: directionally ~\$114.0M. That is 5.4% of the prospect's own ~\$2.1B active contract value [Derived], the margin WorldCC research (2025) finds better contract intelligence puts in reach [Benchmark]. It is the business case your account executive can take to the buyer's CFO. A directional industry benchmark, not a measured result.

Seven (7) assessments, one view

Scored on a five (5) point maturity scale: 1 Ad Hoc; 2 Reactive; 3 Defined; 4 Managed; 5 Optimized. Technology Evaluation is scored out of 4.0 and normalized. A score below 3 means processes exist but depend on specific people.

Assessment	Result	What it tells the vendor
Baseline	Tier 4 · 1,800 active	Enterprise volume across many states; 730 inactive contracts also need a disposition decision before cutover.
Data Fitness	2.9 · Reactive	Date tracking and milestone metadata at 2.5; the fields AI extraction and renewal alerts depend on are not yet reliable.
Governance Foundation	3.1 · Defined	Standards exist, but policy maturity and decision rights need tightening before workflows are built.
Technology Evaluation	2.7 / 4.0 · Defined	Workflow breakdowns and technology workarounds reinforce each other; the platform must address both.
Configuration Readiness	2.8 · Proceed with Caution	No blocking gaps; four (4) design gaps to close before configuration.
Migration Readiness	2.9 · Proceed with Caution	No blocking gaps; four (4) data gaps to close before load.
Change Management	2.9 · Reactive	The prior adoption failure makes this the highest-risk area for go-live.
People & Policy (combined)	3.2 · Defined	Detailed People score of 3.3 sits below the team's own gut-check of Well-Positioned.

Start here: the three (3) actions for this week

1	No Designated System of Record High GAP-001 Designate a single authoritative system and consolidate contract storage.
2	Missed Contract Renewals High GAP-006 Stand up automated alerting and assign renewal ownership.
3	Lost Contract Documents High GAP-007 Inventory and consolidate contracts across every storage location.

Gap profile by root cause

5	3	2	2	1	1
Software Constraints Platform and process work	Process Compliance Enforcement	Manual Operation Automation	Poor or No Process Process design	Policy Policy authoring	Other Investigate

What is most likely to go wrong in the next 12 to 18 months

Revenue and obligation leakage, confirmed

The organization confirmed both lost contract documents and missed renewal or termination deadlines. Across 1,800 contracts averaging \$1M to \$5M, even a low renewal-miss rate compounds into real value lost. The renewal-miss rate is the cleanest before-and-after metric to defend the investment.

System-of-record fragmentation

With no CLM and no designated system of record, portfolio-wide questions (vendor concentration, expiry visibility, obligation coverage) take days instead of minutes.

Inactive contract backlog in migration scope

730 inactive contracts, 150 of them Right-of-Way and Easement Agreements, each need a migrate, archive, or destroy decision before cutover; some carry surviving obligations.

Capacity and key-person concentration

About 69 contracts per person across 26 people: stretched but workable on a manual setup, and fragile wherever knowledge lives in one or two heads. Document processes end to end before adding headcount.

Multi-jurisdictional compliance surface

Operations in six (6) or more states mean home-state templates can silently propagate non-compliant clauses. A jurisdictional review of the top twenty (20) templates is the highest-return first move.

Long-tail supply and joint-venture paper

Capital-intensive operations carry MSA and SOW sprawl and JV paper that outlives its signers; the risk is year-five drift between contract terms and operations.

AI on the horizon

AI summarization of executed contracts and intake classification are within reach today. AI-driven obligation tracking and renewal recommendations are not, until milestone and date metadata improve.

Compliance exposure: Energy & Utilities

FERC regulations; NERC reliability standards; state utility commission requirements; environmental compliance (EPA and state); and Renewable Portfolio Standards. Current compliance maturity is 3.5 of 5.0, so severity is low, but evidence trails, review cadences, and named ownership remain non-discretionary work. Directional regulatory mapping, not a legal opinion.

The scope your implementation team inherits

Configuration and Migration Readiness are load-bearing for a platform decision: they determine how much rework, cost, and delay the implementation carries. Each item below is scope we close with the prospect before the handoff.

Configuration Readiness: 2.8, Proceed with Caution

ID	Configuration gap	Current state	Fix before configuration
CFG-GAP-001	Controlled-value governance incomplete	Value lists mostly de-duplicated; ownership and change process incomplete.	Finish de-duplication, assign list owners, and formalize the add and retire process.
CFG-GAP-002	Field sources partially defined	Core fields sourced; coverage and integration scope incomplete.	Map a source for every field and define integration data flows.
CFG-GAP-003	Contract types without a template	1 of 9 contract types has no template.	Define standard language and structure for each type.
CFG-GAP-004	Contract types without value lists	2 of 9 contract types have no controlled value lists.	Build picklists and lookups before those types are configured.

Migration Readiness: 2.9, Proceed with Caution

ID	Migration gap	Current state	Fix before load
MR-GAP-001	Data quality partly known	Issues identified qualitatively; not measured or owned.	Measure known issues and assign cleanup ownership.
MR-GAP-002	Machine-readability partly assessed	Image-only and legacy-scan volume known but not quantified by source.	Quantify scan volume per source and flag OCR candidates.
MR-GAP-003	Source without a technical owner	1 of 5 sources has no one who can export its data.	Name a technical owner for every source.
MR-GAP-004	Sensitive or regulated data in scope	4 sources contain sensitive, personal, or regulated data.	Confirm retention and access rules; verify the target system enforces them.

High-severity gaps across the core assessments

ID	Gap	Root cause	Fix
GAP-001	No designated system of record	Software constraints	Designate one authoritative system; consolidate storage.
GAP-006	Missed contract renewals	Manual operation	Automated alerting with named renewal owners.
GAP-007	Lost contract documents	Manual operation	Full inventory and consolidation before migration.
GAP-008	Workflow breakdowns confirm technology limits	Software constraints	Address workflow bottlenecks and system gaps in one coordinated initiative.

Ten (10) Medium gaps from the core assessments are detailed in the full client report.

A 75-point implementation checklist, mapped to every gap

The Playbook sequences the work from pre-implementation through the first year after go-live. For this prospect, the tier points to a platform decision, so every phase applies, Pre-Implementation first. Items that close one of the twenty-two (22) detected gaps are flagged.

Workstream	Items	Gaps it relates to
Inventory & Foundation	6	4
Governance & Project Setup	4	8
Solution Selection	5	5
Metadata & Templates	6	7
Configuration & Build	5	5
Data Migration & Integration	6	7
Testing, Go-Live & Hypercare	7	5
Stakeholder & Readiness	6	7
Communications	5	5
Training	7	7
AI Readiness	6	5
Rollout & Adoption	6	5
Post-Go-Live Governance	6	6
Total	75	

What your account executive receives at handoff

A completed readiness scorecard across all seven (7) assessments; the Playbook with gap-closing items marked complete or outstanding; configuration requirements by contract type (templates, value lists, field sources, owners); a reconciled migration inventory by source, including disposition decisions for inactive contracts; and a named executive sponsor with an adoption plan built around the lessons of the prior rollout.

Recommended path for this prospect: **Full Implementation readiness** (9 to 18 months across seven (7) phases), delivered by senior TrailBlazer practitioners alongside your team.

Keep your next stalled deal in play.

Lee Karas, Executive Vice President | LKaras@trailblazerlearningacademy.com | (312) 246-2745