SamVida ai
Discover | Design | Deliver

# A typical CLM implementation approach

Eight phases, each ending in a clear sign-off, with design authority and governance running throughout.

## PHASE 1 — Mobilise

*Set the project up to succeed*

KEY TASKS

- Confirm objectives and success criteria
- Agree governance, roles and plan
- Assess organisational readiness
- Gather sample contracts and data

OUTPUTS

Project plan, governance, success criteria

GATE

**Plan and governance approved**

## PHASE 2 — Discover

*Understand today and tomorrow*

KEY TASKS

- Run requirements workshops
- Map future contracting processes
- Document and prioritise requirements
- Identify integration and data needs

OUTPUTS

Requirements document, future processes

GATE

**Requirements and scope signed off**

## PHASE 3 — Design

*Turn requirements into a design*

KEY TASKS

- Design contract types and templates
- Define workflows, approvals and reminders
- Define security and access
- Plan integrations and data migration

OUTPUTS

Solution design document

GATE

**Solution design signed off**

## PHASE 4 — Configure

*Build and prove the solution*

KEY TASKS

- Configure in short cycles with demos
- Build templates, clauses and integrations
- Test end to end
- Review configuration against design

OUTPUTS

Configured, tested system

GATE

**Ready for UAT**

## PHASE 5 — UAT

*The business proves it works*

KEY TASKS

- Business runs real-life test scenarios
- Triage and fix issues daily
- Retest fixes
- Agree any open items

OUTPUTS

UAT results and sign-off

GATE

**UAT sign-off**

## PHASE 6 — Go-live

*People and production ready*

KEY TASKS

- Train users and super-users
- Communicate the change
- Migrate and validate data
- Rehearse cutover; decide go/no-go

OUTPUTS

Trained users, migrated data, cutover plan

GATE

**Go/no-go decision**

## PHASE 7 — Hypercare

*Stabilise and hand over*

KEY TASKS

- Provide dedicated early support
- Fix issues quickly
- Track adoption from day one
- Hand over to BAU support

OUTPUTS

Handover pack, as-built design

GATE

**Handover accepted**

## PHASE 8 — Measure

*Embed adoption and value*

KEY TASKS

- Run adoption reviews at one, two and three months
- Track adoption and cycle-time KPIs
- Prioritise improvements
- Plan the next phase

OUTPUTS

Adoption metrics, improvement backlog

GATE

**Value reviewed with sponsor**

**Design authority, across every phase** — A client-led design authority team keeps the solution coherent: decisions recorded, changes controlled.

**Programme governance, across every phase** — Regular status reporting, risks and issues managed, and a steering group for key decisions.

Time invested in phases 1–3 pays back across the whole project. Rushing to go live usually leads to low adoption or rework.

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