Enterprise-wide Contract Lifecycle Management (CLM) Initiative

Enterprise-Wide Initiative

Sponsored and funded by UCOP with cross-functional leadership support

Collaborative Selection

Cross-functional and cross-campus effort jointly led by Procurement, Legal, and IT teams

Inclusive Access

Available for additional functional stakeholders and campuses to opt-in at launch

Systemwide Deployment

Roll out and maintained by Systemwide Procurement for consistent implementation and ongoing support

Strategic Benefits



Operational Efficiency and Cost Saving

- Automates the contract process end-to-end
- Reducing cycle time and minimizing manual effort with AI-empowered capabilities
- Prevents value leakage through missed renewals or unfavorable terms



Compliance and Risk Management

- Standardizes templates and clauses
- Ensures alignment with policies and regulations
- Provides audit-ready visibility across the System and contract portfolio



Visibility and Strategic Insights

- Delivers a centralized platform with real-time tracking and analytics
- Leverages contract analytics to support strategic sourcing, negotiation, and category strategies

CLM Solution Scope: Full End-to-End Capabilities from Intake to Intelligence

Intake & Request
Centralized contract (and document) request portal with automated routing and priority classification

Repository & Search
Intelligent document storage with advanced search, tagging, and metadata management

Signature & Execution
Integrated e-Signature capabilities with audit trails and automated status notifications



Authoring & Drafting
AI-powered template selection, clause libraries, and pre-award contract comparison

Negotiation & Collaboration
Real-time collaboration tools with redlining, version control, audit trail, and stakeholder communication

Review & Approvals
Automated approval workflows with conditional routing based on contract terms and risk levels

Post-Award Management
Automated obligation tracking, milestone monitoring, and performance management throughout contract lifecycle

Risk & Compliance
Continuous compliance monitoring, risk assessment automation, and regulatory change management

Renewals & Terminations
Proactive renewal notifications, automated termination workflows, and systematic contract archival processes

Analytics & Reporting
Real-time dashboard, performance metrics, and contract analytics for decision-making

AI-Assisted Modern CLM Overlay
Advanced AI capabilities span the entire lifecycle

ERP/ePro Integration and Data Flow
Connectivity with ePro and ERP to ensure data consistency and flow

Technology Adoption Options

Early Engagement:

Provide business requirements via functional representatives

- Procurement
- Business Contracts
- Legal/Legal Ops
- Policy & Compliance
- IT
- Risk (tbd)

Pragmatic/Later Adopter:

Opt-in as end-users once solution is implemented, suitable for specialized functions:

- Research
- Investment Office
- Real Estate
- Others with lower contract volumes





Core Project Team Role:

- Business Requirements Gathering
- Participate in demos
- Sandbox testing
- Evaluation leading to final selection
- 2-5 hours weekly

Functional Team Role:

- Stay informed through Functional Reps on the Core Project Team
- Business Requirement Collaboration
- Product champions
- 2-5 hours monthly

Meet Your CLM Project Core Team

The Enterprise-Wide CLM initiative is driven by a collaborative effort across the University System
Below are key team members ensuring its success

CLM Core Project Team	
Executive Sponsors	Russ Chung, Paul Williams, Van Williams
Project Lead	Vickie Hsi
Technical Project Manager	Laurence Krueger
Sourcing Lead	Michael Wegman

Core Project Team / Functional Representatives / SMEs	
Procurement Contracts	Valerie Roque, Theresa Cline, Brian Le, Sean Pamer, Sean Parker, Bob Stueber, Preston Wright
Business/Rev Contract	Injeel Harris, Quan Luc, Natasa Janez
SWP IAS	Karen Rhee, Kevin Pham, Jiazhi Ma
SWP IPC	Fred Roots
Legal	Emily Berger
Legal Ops & Legal IT	Robert Harvey, Patrick Roach
IT	Katja Grigorova
Security & Privacy	Damien Luma, Jeff Thompson
Risk Services for COI	Charlie Goodrich / Fred Roots
Change Communication	Diane Solinger

Have questions or wish to participate? Please reach out to your functional / campus representatives
For general inquiries about the initiative, please contact Vickie Hsi (vickie.hsi@ucop.edu) directly