CLM+ Implementation

DOCUSIGN INSIGHT LEARNING CREDITS

ACTIVATION SERVICES

- Two environments (production and development)
- 125 pre-configured topics and subtopics
- Eight pre-configured BI dashboards
- Four pre-configured views and four pre-configured export views
- Four pre-configured scorecards
- Clause library structure

UP TO 225 HOURS OF ADD-ON SERVICES INCLUDING

- Discovery work sessions
- Bespoke AI models
- Platform configurations
- Ingestion, advisory, and adoption services
- End users training sessions
- Project management and all project related artifacts
- SSO integration

INTELLIGENT DRS (DOCUMENT REVIEW SERVICES)

DOCUSIGN CLM

- 1 Automated CLM Workflow with up to three routes for approval, including external review and signature
- Four client templates, including up to 30 merge fields
- Up to 20 attributes for reporting and searching capabilities
- Custom CLM folder structure (including creation and environment organization)
- Up to 15 notifications and three reminders
- Five custom reports and one dashboard
- Two scorecards (with existing and in scope AI models)
- Post Go-Live training sessions (up to five hours)
- Salesforce integration (additional/optional)

cimplifi™

For pricing information, please reach out to calm@cimplifi.com.

IDRS ASSUMPTIONS

- 4 standard subtopics (Start date; Termination date, Internal party; External party) -- Auto renewal and ever green classification are out of scope
- Relevant dates will be in close proximity to description of date (e.g. effective date is …). Freestanding dates will not be captured
- Contract duration may be used to calculate termination date (if applicable)
- 1 Effective Date and 1 Termination date specified per file
- Language indicating effective or termination periods without dates will not be captured
- Consistent language pattern evidencing effective date of the contract if multiple dates referred to as effective date (e.g. effective date, execution date, date signed etc)
- If available, list of internal and external party names will be provided at kick-off
- Isolated dates from signature blocks may not be captured (without extra effort)
- Party names will be displayed as they exist in the contract rendering
- All party names provided from customer will be used in extracting information (list must be free of random, non-party words)
- Party "capacity" information will be provided to Cimplifi, where applicable (e.g., in vendor contracts, customer will be "buyer" or "customer")
- OCR errors in relation to date or name may not be captured
- Handwritten dates are not capturable
- Handwritten parties are not capturable
- Letters and emails will not be evaluated
- Relevant data may be pulled from locations outside of the document including filename or existing repositories. This process may include activities outside of Insight and be overlaid (in Excel). Resulting process may not be straight click-thru depending on these challenges.
- Cimplifi will be included in ingestion process to Insight (where possible) to enable best practices and ability to leverage existing data
- Single document in one file; No concatenated documents
- Total document population: <=100,000 (cos we are validating up to 1000 docs, or 10% of the total population whichever hit first)
- No more than 10 document types among the total population
- Access to existing materials relating to the client's existing processes, protocols, and procedures

IDRS ASSUMPTIONS, CONT.

- Cimplifi team will be onboarded and have access to the relevant environment, as necessary
- Key Personnel will be reasonably available for interviews
- Scope of work only applicable to DocuSign Insight platform
- English documents only

OTHER ASSUMPTIONS:

- Up to 100,000 documents included
- List of in scope bespoke AI models will be finalized after AI models workshops
- Scope of implementation will be finalized after solution discovery workshops
- Cimplifi team will be onboarded and have access to the relevant environment and documents prior to the 2nd workshop
- Contract templates, target metadata, and DocuSign CLM environment will be deployed and loaded by or before the start of the engagement
- Cimplifi team will have access to DocuSign CLM environment and template agreements in advance
- Creation, review, approval, and execution phases will be scoped in advance
- Key personnel will be reasonably available for interviews
- Scope of work only applicable to DocuSign platform
- Family mapping exercise and tabular data extraction is out of scope
- License fees not included
- Cimplifi paper
- Pricing subject to change pending final scoping call with Cimplifi team