Work Samples - Ironclad

Prepared by: Niyati Vyas

Role: Senior Consultant | Cloudsage Consultancy Inc.

1. CLM Workflow Design Document – Ironclad

Project Title: Legal Contract Automation & Workflow Setup in Ironclad

Client Type: SaaS Company (Legal & Sales Teams)

Tool Used: Ironclad CLM, DocuSign, Salesforce

Scope of Work:

- Designed and implemented a full contract lifecycle process using Ironclad.
- Created dynamic intake forms based on contract types (e.g., NDAs, MSAs, SOWs).
- Set up approval workflows by department and contract value.
- Integrated with DocuSign for e-signatures.
- Defined metadata tagging (e.g., contract type, region, term) for improved search and reporting.

Key Deliverables:

- Legal Intake to Signature flow setup
- Metadata standardization across templates
- Role-based access controls for sensitive documents
- Training guide for legal and sales teams
- Reduced manual contract review steps by ~40%

2. Salesforce to Ironclad Integration via Zapier

Project Title: Auto-Generate Contracts from Salesforce Opportunities

Client Type: Revenue Operations Team

Tools Used: Salesforce, Ironclad, Zapier

Integration Flow:

1. **Trigger:** A Salesforce Opportunity moves to "Contract Needed" stage.
2. **Zapier Action:** Fetches Opportunity details like:
   - Account Name
   - Contract Value
   - Contract Type
   - Term Start/End Date
3. **Zapier Action:** Sends data to Ironclad to auto-create a contract draft.
4. **Optional:** Sends notification to legal team on Slack/email.

Outcome:

- Reduced contract creation turnaround time from 2 days to under 30 minutes.
- Legal team received contracts already populated with deal data

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3. Contract Lifecycle Dashboard

Tool Used: Salesforce Reports + Ironclad Insights

Metrics Tracked:

- Total contracts in draft, review, executed stages
- Avg. time from request to signature
- Contract requests by department
- Owner-wise open contracts